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ENERGY JOBS SHOWING GROWTH IN EASTERN, SOUTHEASTERN IDAHO

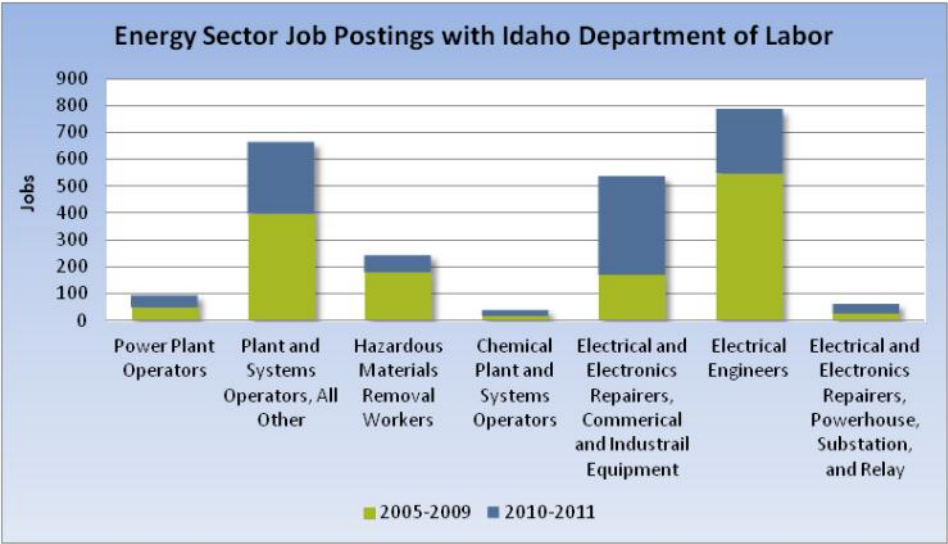
Unemployed workers with college degrees have historically lower unemployment rates than those without a high school diploma. The most recent recession focused the need for education as it increased the unemployment rate gap between these two worker groups. Before the recession, the difference between unemployment rates for those with college degrees and those without high school diplomas was usually within 5 percentage points. In February 2010 the gap reached a high of 12.9 percentage points.

The recession powered the desire for many of Idaho's unemployed to increase their education. Many Idaho colleges and universities have all-time high enrollments. According to the Integrated Postsecondary Education Data System, the number of bachelor's degrees and awards issued by Idaho's four largest universities increased by 19 percent between the 2006-07 and 2009-10 school years. Much of that was the result of significant growth at Brigham Young University-Idaho, where the number of bachelor's degrees awarded increase by 24 percent.

The strong correlation between educational attainment and unemployment is a significant factor when many Idahoans make the choice to "Go-On" and gain advanced education. A skilled and educated workforce will be a key factor in Idaho's long-term economic growth. Economists rarely see the glass as half full, but this is one good thing that could come from one of the worst recessions on record.

Job postings with the Idaho Department of Labor underscore the growth potential. From 2005 through 2011 demand to fill occupations associated with the energy industry grew rapidly.

There are fewer jobs in some of the targeted occupations than in others. But the trend shows significant growth in the number of job listings since 2005 and especially in 2010 and 2011. That is particularly true for commercial and industrial electrical and electronic equipment repair, an occupation vital



to the energy sector as a whole. In 2008 there were only 15 posting for this occupation. By 2011 the number had jumped to 315.

Overall, job postings for these seven specific energy sector jobs doubled in 2011 after exceeding 300 for only the second time since the 2001 recession. The other time was in 2006 as the expansion was beginning to peak.

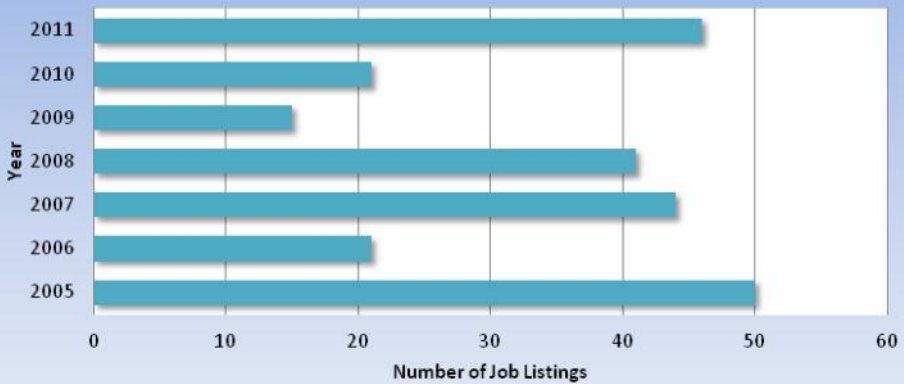


Growth in this sector is important for Idaho since many energy related jobs have a high job multiplier, meaning they generate more additional employment in the economy because the wages are typically well above the average. That additional income to workers helps increase jobs in sectors like retail, hospitality and education because those energy workers have more money to spend.

Southeastern Idaho has recently benefited from the rise in energy employment. Pocatello was chosen by ATCO for its new manufacturing facility and 150 new jobs. ATCO makes modular buildings used by the oil and natural gas industry. ATCO's structures provide lodging, office and recreational space in remote areas where housing and other buildings are not available.

But ATCO is not the only new energy related employer in the region. Both southeastern and eastern Idaho have been identified by the Idaho Department of Labor as regions where the energy industry is likely to produce a significant number of jobs in the future. While not as substantial as the state as a whole, growth in energy related occupations has been notable in southeastern Idaho in recent years.

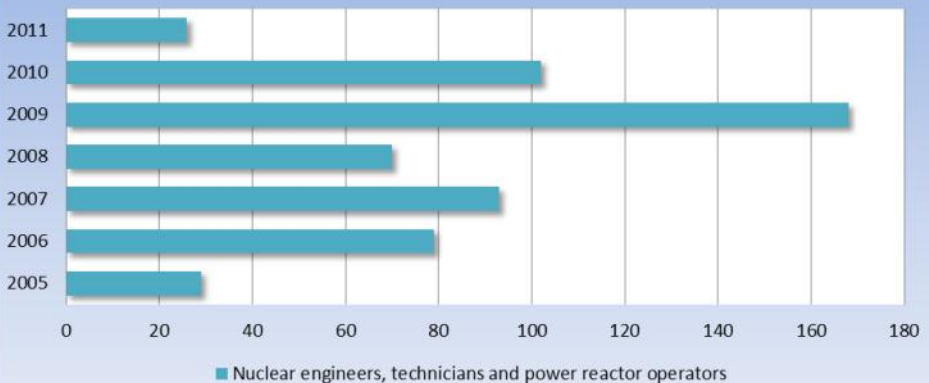
Selected Energy Related Job Listings for Southeastern Idaho



One component of the energy sector that has not shown job growth in Idaho is nuclear energy. Despite an overall good safety record in the United States, nuclear energy has been under much public scrutiny, which intensified following the accident at the Fukushima Daiichi nuclear power plant in Japan last year.

The number of job postings for nuclear engineers dropped from 99 in 2009 to 22 in 2011. Between 2009 and 2011 the number of postings for nuclear technicians and nuclear power reactor operators dropped substantially from 32 to 4.

Nuclear Energy Idaho Job Listings



The energy sector is important to Idaho and holds promise. It has the potential to produce many high-paying jobs, lifting the state's economy. These jobs also have an added degree of security because of the growing need for energy both domestically and globally.

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RECENT GRADS FACE TOUGH LABOR MARKET

Unadjusted unemployment rates typically show a seasonal increase in May and June, partly due to college graduates entering the labor force. Before the recession the unemployment rate for college graduates 25 and older was around 2 percent. It has more than doubled since. The Institute of Education Sciences estimates there will be 1.7 million bachelor's degrees and 833,000 associate degrees awarded at U.S. colleges and universities during the 2011-12 school year.

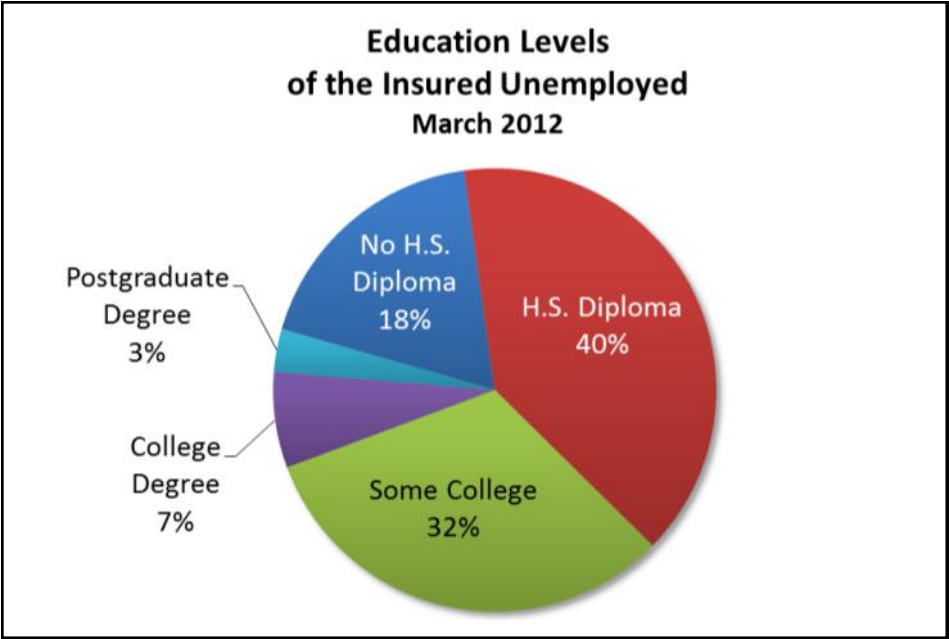
At 4.1 percent in March 2012, the nationwide unemployment rate for workers 25 and older with bachelor’s degrees was considerably lower than the average rate of 7.7 percent. In March 2012 unemployed workers with less than a high school education posted an unemployment rate of 13.8 percent – down from 15.2 percent from a year earlier. Even those that hold a bachelor’s degree have seen some relief with the rate down two-tenths from March 2011.

Annual rates in 2011 compare closely to 2009 when the recession was at its height and the nationwide recovery began. Even though the recession was officially declared over in 2009, unemployment rates for workers of all education levels continued to increase throughout 2010. Nearly two years went by before some improvement was detected in labor markets.

Annual National Unemployment Rates By Education Level							
Year	All Workers 25 and Older	No High School Diploma	High School Grad	Some College, No Degree	Bachelor's and Higher	Associate Degree	Some College or Associate Degree
2007	3.6	7.1	4.4	3.8	2.0	3.0	3.6
2008	4.6	9.0	5.7	5.1	2.6	3.7	4.6
2009	7.9	14.6	9.7	8.6	4.6	6.8	8.0
2010	8.2	14.9	10.3	9.2	4.7	7.0	8.4
2011	7.6	14.1	9.4	8.7	4.3	6.8	8.0

In 2011, workers with a high school diploma or less made up 51 percent of the unemployed age 25 and older. Job seekers with at least a bachelor’s degree accounted for 20 percent. Those with at least some college or an associate degree comprised the remaining 29 percent.

The federal Bureau of Labor Statistics does not produce unemployment rates by education attainment at the state level. But statewide unemployment claimant characteristics do provide some level of understanding. Workers with a high school diploma or less make up 58 percent of Idaho’s insured unemployed. Workers with at least a college degree make up 10 percent of the insured unemployed – only 3 percent if they have a postgraduate degree.



Unemployed workers with college degrees have historically lower unemployment rates than those without a high school diploma. The most recent recession focused the need for education as it increased the unemployment rate gap between these two worker groups. Before the recession, the difference between unemployment rates for those with college degrees and those without high school diplomas was usually within 5 percentage points. In February 2010 the gap reached a high of 12.9 percentage points.

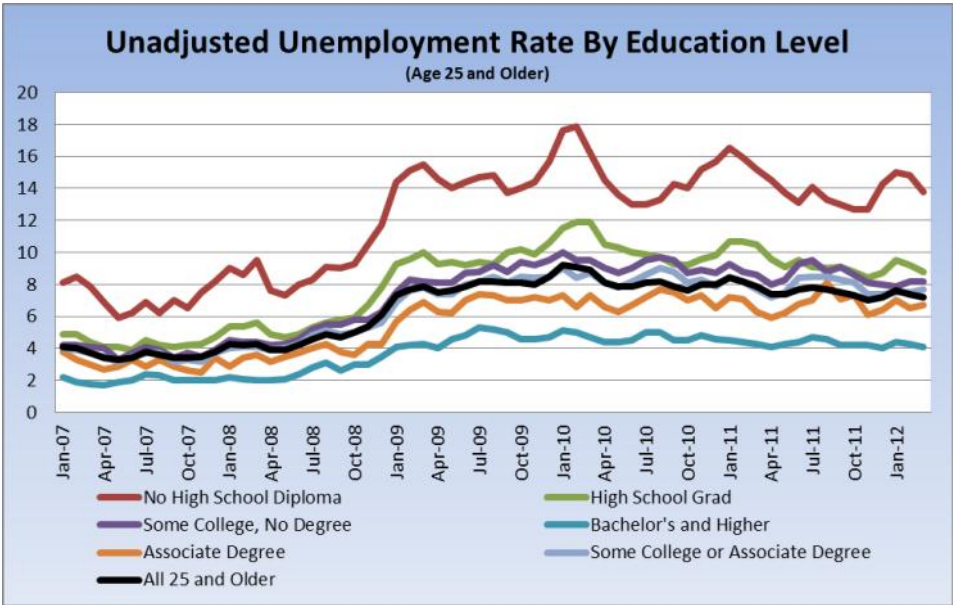
Number of Workers Unemployed Nationally By Education Level (in thousands)							
Year	All 25 and Older	No High School Diploma	High School Graduate	Some College	Bachelor's Degree or Higher	Associate Degree	Some College or Associate Degree
2007	4,735	886	1,682	882	892	393	1,275
2008	6,094	1,092	2,166	1,176	1,158	502	1,678
2009	10,505	1,775	3,699	1,989	2,103	938	2,927
2010	10,968	1,765	3,943	2,120	2,167	973	3,093
2011	10,113	1,632	3,521	1,974	2,024	963	2,937

The recession powered the desire for many of Idaho’s unemployed to increase their education. Many Idaho colleges and universities have all-time high enrollments. According to the Integrated Postsecondary Education Data System, the number of bachelor’s degrees and awards issued by Idaho’s four largest universities increased by 19 percent between the 2006-07 and 2009-10 school years. Much of that was the result of significant growth at Brigham Young University-Idaho, where the number of bachelor’s degrees awarded increase by 24 percent.

Bachelor's Degrees, Awards By School	2009-2010	2006-2007
Brigham Young University-Idaho	2,816*	2,279
Boise State University	2,097	1,829
University of Idaho	1,640	1,807
Idaho State University	1,095	1,127
Total	7,648	7,042

Source: IPEDS Data Center

*Adjusted



The strong correlation between educational attainment and unemployment is a significant factor when many Idahoans make the choice to “Go-On” and gain advanced education. A skilled and educated workforce will be a key factor in Idaho’s long-term economic growth. Economists rarely see the glass as half full, but this is one good thing that could come from one of the worst recessions on record.

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SOME IDAHO INDUSTRIES GREW DURING RECESSION, OFFSET LOSSES IN OTHERS

The recession that stripped Idaho’s economy of over 57,000 private sector jobs and more than \$1.5 billion in wages did not hit every industry equally.

The severe losses in construction and manufacturing were becoming obvious even before the recession officially began in December 2007 – nearly 35,000 lost jobs and over \$1.2 million in wages in those two sectors alone, leading to erosion in much of the rest of the economy as the recession wore on. Trucking, transportation, financial services, retailing, recreation, business services and even telecommunications and many information services all took hits, some severe.

But a third of the 92 private industry subsectors identified by the North American Industrial Classification System – led by health care – posted increases in both wages and employment between late 2007 and late 2010.

Without those gains, the recession’s impact on the Idaho economy would have been significantly greater. They partially offset more than 60,000 lost jobs and \$2.3 billion in lost wages in the other two-thirds of the nongovernment economy.

Between the third quarter of 2007, just before the recession began, and the third quarter of 2010, six months after it ended, health care was the strongest piece of the economy, posting \$434 million in new wages and 7,100 in new jobs to push total employment over 70,000 on a payroll of \$2.9 billion.

Private educational services followed with nearly 2,000 more jobs and \$130 million in additional wages, bringing total payroll to more than \$1.7 billion for 55,300 jobs.

Some sectors meeting essential needs survived the recession without suffering losses – livestock producers, food manufacturers, utilities, gasoline stations and wholesalers of nondurable goods like food and clothing.

Businesses selling items like water, coffee-break supplies and frozen foods directly to other businesses or individuals and newspaper deliverers showed gains during the recession as did Internet publishers and other information services.

Agencies offering social assistance to those hard hit by the recession also expanded payrolls.

There were 10 subsectors where wages rose but employment dropped. The leader was professional, scientific and technical services, where total wages were up 4 percent while jobs were down 6.6 percent.

Restaurants and general merchandise stores found themselves in the same situation. Restaurants, both carry-out and sit-down, reported a modest

1.4 percent increase in wages while the number of employees dropped 8 percent. And the warehouse clubs and superstores boosted wages 10 percent while cutting jobs 2 percent.

To an extent, those sectors could reflect employers paying more overtime as they extend hours for remaining workers or compensating those remaining workers for taking on the additional duties of those who were laid off or left.

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Recession's Impact Private Sector Economy						
	Wages 2010	Change from 2007	% Change	Jobs 2010	Change from 2007	% Change
111-Crop Production	\$210,510,857	\$20,804,826	11.0%	7,642	-178	-2.3%
112-Animal Production	\$240,129,295	\$27,763,269	13.1%	8,739	351	4.2%
113-Forestry and Logging	\$48,126,341	(\$24,491,741)	-33.7%	1,230	-655	-34.7%
115-Support Activities for Agriculture and Forestry	\$1,247,315	(\$94,030)	-0.1%	57	78	2.0%
114-Fishing, Hunting and Trapping	\$93,520,199	(\$240,177)	-16.1%	3,922	-29	-34.1%
211-Oil and Gas Extraction	\$4,087,958	\$2,225,997	119.6%	26	7	39.1%
212-Mining (except Oil and Gas)	\$125,967,438	(\$1,713,817)	-1.3%	1,971	-383	-16.3%
213-Support Activities for Mining	\$14,420,157	\$4,172,546	40.7%	238	52	28.3%
221-Utilities	\$203,212,554	\$62,050,973	44.0%	3,320	517	18.5%
236-Construction of Buildings	\$267,288,584	(\$186,718,203)	-41.1%	7,189	-6,088	-45.9%
237-Heavy and Civil Engineering Construction	\$331,051,634	(\$70,139,492)	-17.5%	6,084	-1,183	-16.3%
238-Specialty Trade Contractors	\$636,251,971	(\$393,315,737)	-38.2%	19,384	-13,854	-41.7%
311-Food Manufacturing	\$573,704,417	\$56,404,493	10.9%	15,445	512	3.4%
312-Beverage and Tobacco Product Manufacturing	\$18,260,322	\$3,859,263	26.8%	562	95	20.3%
313-Textile Mills	\$2,364,659	\$1,020,200	75.9%	66	11	19.2%
314-Textile Product Mills	\$4,980,024	(\$383,896)	-7.2%	178	-49	-21.7%
315-Apparel Manufacturing	\$7,684,535	\$2,473,396	47.5%	298	38	14.6%
316-Leather and Allied Product Manufacturing	\$3,448,383	\$620,786	22.0%	118	3	2.2%
321-Wood Product Manufacturing	\$165,425,063	(\$112,204,236)	-40.4%	4,510	-3,358	-42.7%
322-Paper Manufacturing	\$91,030,385	\$197,795	0.2%	1,551	-129	-7.7%
323-Printing and Related Support Activities	\$38,086,168	(\$16,193,400)	-29.8%	1,289	-630	-32.8%
324-Petroleum and Coal Products Manufacturing	\$1,118,539	\$582,847	108.8%	31	11	55.2%
325-Chemical Manufacturing	\$120,047,491	\$10,493,432	9.6%	2,210	-10	-0.4%
326-Plastics and Rubber Products Manufacturing	\$49,229,247	(\$3,901,350)	-7.3%	1,516	-221	-12.7%
327-Nonmetallic Mineral Product Manufacturing	\$50,574,944	(\$28,995,542)	-36.4%	1,269	-574	-31.1%
331-Primary Metal Manufacturing	\$25,855,137	\$2,276,262	9.7%	680	109	19.1%
332-Fabricated Metal Product Manufacturing	\$168,442,846	\$2,943,090	1.8%	4,396	-222	-4.8%
333-Machinery Manufacturing	\$104,457,652	(\$11,193,443)	-9.7%	2,500	-454	-15.4%
334-Computer and Electronic Product Manufacturing	\$891,644,320	(\$389,876,985)	-30.4%	10,529	-6,147	-36.9%
335-Electrical Equipment, Appliance and Component Manufacturing	\$27,857,099	\$6,029,387	27.6%	614	102	20.0%
336-Transportation Equipment Manufacturing	\$92,324,434	(\$32,517,453)	-26.0%	2,407	-1,083	-31.0%
337-Furniture and Related Product Manufacturing	\$42,233,892	(\$29,105,785)	-40.8%	1,427	-1,095	-43.4%
339-Miscellaneous Manufacturing	\$58,572,227	(\$13,174,211)	-18.4%	1,528	-323	-17.4%
423-Wholesale Trade, Durable Goods	\$542,347,092	(\$72,494,410)	-11.8%	11,155	-1,716	-13.3%
424-Wholesale Trade, Nondurable Goods	\$485,549,934	\$51,056,466	11.8%	12,022	35	0.3%
425-Electronic Markets and Agents and Brokers	\$150,285,874	(\$22,620,362)	-13.1%	2,616	-337	-11.4%
441-Motor Vehicle and Parts Dealers	\$373,438,413	(\$101,351,564)	-21.3%	10,326	-2,115	-17.0%
442-Furniture and Home Furnishings Stores	\$60,817,974	(\$29,476,453)	-32.6%	2,197	-883	-28.7%
443-Electronics and Appliance Stores	\$86,532,160	\$1,836,191	2.2%	2,451	-270	-9.9%
444-Building Material and Garden Equipment and Supplies Dealers	\$192,761,502	(\$88,354,893)	-31.4%	6,929	-2,744	-28.4%
445-Food and Beverage Stores	\$263,729,414	(\$48,204,210)	-15.5%	12,479	-591	-4.5%
446-Health and Personal Care Stores	\$95,540,710	\$5,624,314	6.3%	3,030	-97	-3.1%
447-Gasoline Stations	\$98,852,472	\$16,185,388	19.6%	5,763	274	5.0%
448-Clothing and Clothing Accessories Stores	\$64,860,992	(\$4,241,244)	-6.1%	4,392	-271	-5.8%
451-Sporting Goods, Hobby, Book and Music Stores	\$75,693,969	(\$1,010,995)	-1.3%	4,445	-152	-3.3%
452-General Merchandise Stores	\$349,905,229	\$10,527,605	3.1%	16,228	-1,079	-6.2%
453-Miscellaneous Store Retailers	\$90,314,054	(\$8,916,072)	-9.0%	4,450	-610	-12.0%
454-Nonstore Retailers	\$124,531,472	\$20,036,444	19.2%	2,960	531	21.9%
481-Air Transportation	\$32,733,105	\$1,293,386	4.1%	830	-97	-10.5%

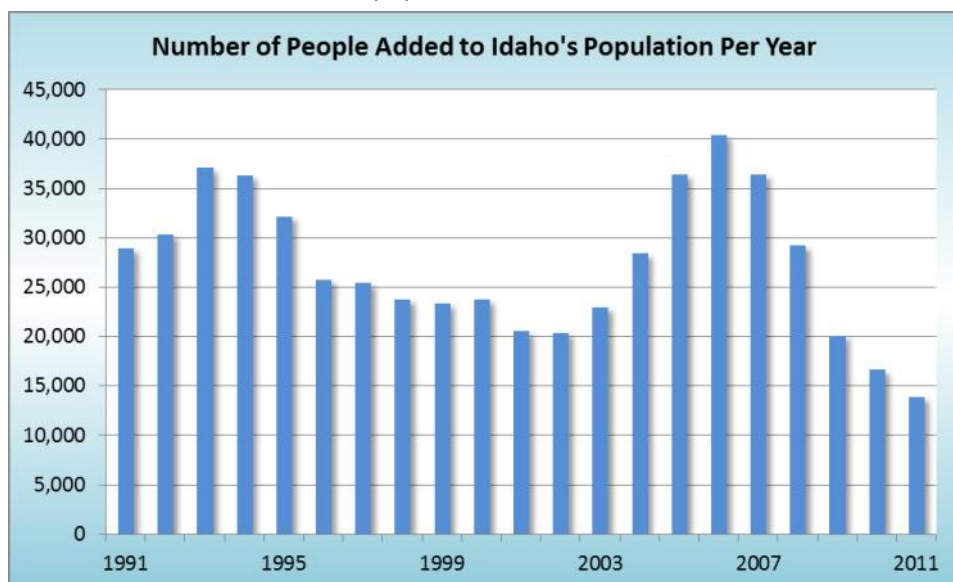
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	Wages 2010	Change from 2007	% Change	Jobs 2010	Change from 2007	% Change
482-Rail Transportation	\$166,986	(\$149,592)	-47.3%	4	-7	-65.4%
483-Water Transportation	\$101,313	(\$37,577)	-27.1%	3	0	-14.3%
484-Truck Transportation	\$307,907,281	(\$20,058,136)	-6.1%	8,665	-743	-7.9%
485-Transit and Ground Passenger Transportation	\$45,322,386	\$6,804,484	17.7%	2,410	171	7.7%
486-Pipeline Transportation	\$6,228,522	\$793,550	14.6%	70	3	4.7%
488-Support Activities for Transportation	\$4,883,083	\$4,005,792	7.9%	324	20	1.4%
487-Scenic and Sightseeing Transportation	\$54,837,034	(\$536,959)	-9.9%	1,480	-18	-5.3%
491-Postal Service	\$129,395,872	(\$7,096,045)	-5.2%	2,685	-256	-8.7%
492-Couriers and Messengers	\$69,136,643	(\$3,923,122)	-5.4%	1,836	-330	-15.2%
493-Warehousing and Storage	\$54,602,821	\$10,375,269	23.5%	1,629	291	21.7%
511-Publishing Industries	\$104,995,023	(\$27,274,899)	-20.6%	2,805	-631	-18.4%
512-Motion Picture and Sound Recording Industries	\$10,938,981	(\$164,943)	-1.5%	872	-94	-9.8%
515-Broadcasting (except Internet)	\$53,272,899	(\$6,655,601)	-11.1%	1,557	-177	-10.2%
516-Internet Publishing and Broadcasting	\$0	(\$2,321,563)	-100.0%	0	-40	-100.0%
517-Telecommunications	\$161,483,615	(\$19,592,278)	-10.8%	3,413	-534	-13.5%
518-ISP's, Search Portals and Data Processing	\$25,534,629	\$6,332,595	33.0%	454	64	16.4%
519-Other Information Services	\$53,458,586	\$29,982,048	127.7%	1,298	386	42.3%
521-Monetary Authorities - Central Bank	\$556,220	\$397,430	250.3%	12	9	300.0%
522-Credit Intermediation and Related Activities	\$443,677,472	(\$62,691,846)	-12.4%	10,947	-868	-7.3%
523-Securities, Commodity Contracts, Other Financial Investments and Related Activities	\$128,457,730	\$10,204,635	8.6%	1,688	258	18.0%
524-Insurance Carriers and Related Activities	\$367,536,226	(\$12,476,473)	-3.3%	7,694	-856	-10.0%
525-Funds, Trusts and Other Financial Vehicles	\$4,617,013	(\$1,664,070)	-26.5%	94	-40	-30.1%
531-Real Estate	\$139,367,174	(\$52,469,979)	-27.4%	5,110	-1,179	-18.7%
532-Rental and Leasing Services	\$51,045,769	(\$12,955,727)	-20.2%	1,959	-724	-27.0%
533-Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$3,861,643	(\$252,881)	-6.1%	70	-15	-18.2%
541-Professional, Scientific and Technical Services	\$1,717,274,892	\$65,734,198	4.0%	31,629	-2,218	-6.6%
551-Management of Companies and Enterprises	\$472,072,526	(\$222,031,088)	-32.0%	6,065	-1,742	-22.3%
561-Administrative and Support Services	\$855,135,542	(\$68,854,245)	-7.5%	34,784	-4,957	-12.5%
562-Waste Management and Remediation Services	\$131,014,985	\$33,339,334	34.1%	2,576	482	23.0%
611-Educational Services	\$1,742,936,078	\$126,335,478	7.8%	56,219	1,970	3.6%
621-Ambulatory Health Care Services	\$1,209,142,091	\$129,958,569	12.0%	29,412	2,862	10.8%
622-Hospitals	\$1,221,073,673	\$266,027,692	27.9%	25,867	2,808	12.2%
623-Nursing and Residential Care Facilities	\$291,436,245	\$38,079,449	15.0%	13,242	1,433	12.1%
624-Social Assistance	\$226,247,647	\$26,590,417	13.3%	12,918	1,049	8.8%
711-Performing Arts, Spectator Sports and Related Industries	\$19,732,169	(\$584,912)	-2.9%	1,027	130	14.4%
712-Museums, Historical Sites and Similar Institutions	\$12,659,277	\$2,078,847	19.6%	379	37	10.9%
713-Amusement, Gambling, and Recreation Industries	\$155,830,542	(\$9,409,086)	-5.7%	8,861	-538	-5.7%
721-Accommodation	\$135,752,252	(\$13,377,043)	-9.0%	8,298	-495	-5.6%
722-Food Services and Drinking Places	\$520,947,634	\$7,244,112	1.4%	41,745	-3,564	-7.9%
811-Repair and Maintenance	\$181,602,271	(\$9,434,733)	-4.9%	6,354	-690	-9.8%
812-Personal and Laundry Services	\$76,521,857	(\$70,307)	-0.1%	4,332	-118	-2.6%
813-Religious, Grantmaking, Civic, Professional, Similar Organizations	\$110,665,516	\$7,769,469	7.6%	4,613	22	0.5%
814-Private Households	\$16,348,504	\$1,654,809	11.3%	903	152	20.3%
Source: Quarterly Census of Employment and Wages						

WHY IDAHO'S POPULATION GROWTH SLOWED

The recession and its aftermath dampened population growth in the United State and Idaho.

After two decades of strong growth, the U.S. population is growing at the slowest rate since the Great Depression, gaining 2.3 million people from 2010 to 2011. That's the smallest annual gain since 1988. For two years in a row, the population has grown an average of just 0.7 percent a year, down from annual increases around 1 percent in the years before the recession. That's the slowest increase since the late 1930s.

Idaho's population growth slowed from 2.1 percent a year between 2000 and 2007 to 1 percent a year between 2009 and 2011. Idaho added an average of 15,300 people a year to its population base in the last two years—about half of the average 29,400 people it added per year before the recession. That's the smallest population increase since 1989.



Population grows for two reasons – more births than deaths causing natural increase and more people moving in than moving out resulting in migration increases. The economic downturn reduced both natural increase and in-migration.

NATURAL INCREASE SLOWS

A troubled economy has caused many young adults to postpone marriage and children. The U.S. fertility rate, which has been close to the replacement level of 2.1 children per woman in contrast to many developed nations that are well below that level, now has fallen to 1.9. The number of babies born between July 1, 2010 and July 1, 2011 dropped 200,000 from two years before.

Births in Idaho peaked at 25,158 in 2008, fell to 23,726 in 2009 and then to 22,954 between July 1, 2010 and June 30, 2011. That is the fewest births since 2004 despite growth in the young adult population. At the same time, the aging of the population increased the deaths from 10,927 in 2008 to 11,275 in the 12-month period ending June 30, 2011. So, net natural increase, which added 14,231 people to Idaho's population in 2008, added only 11,679 from mid-2010 to mid-2011.

Idaho 2011 Population by Region and County

	Population	Change from 2010	% Change from 2010	Natural Change	Migration Change
State of Idaho	1,584,985	13,883	0.9%	11,679	2,136
1: North	214,625	1,754	0.8%	522	1,219
Benewah County	9,209	-78	-0.8%	-11	-68
Bonner County	40,808	-116	-0.3%	27	-142
Boundary County	10,804	-211	-1.9%	-13	-200
Kootenai County	141,132	2,219	1.6%	567	1,638
Shoshone County	12,672	-60	-0.5%	-48	-9
2: North Central	106,217	725	0.7%	214	513
Clearwater County	8,702	-46	-0.5%	-38	-8
Idaho County	16,446	155	1.0%	0	154
Latah County	37,704	390	1.0%	262	129
Lewis County	3,822	-1	0.0%	-7	7
Nez Perce County	39,543	227	0.6%	-3	231
3: Southwest	700,504	8,781	1.3%	5,172	3,579
Ada County	400,842	7,376	1.9%	2,721	4,633
Adams County	3,977	23	0.6%	4	18
Boise County	7,025	8	0.1%	-4	13
Canyon County	191,694	2,284	1.2%	1,886	411
Elmore County	26,346	-734	-2.7%	341	-1,094
Gem County	16,665	-4	0.0%	-8	5
Owyhee County	11,438	-53	-0.5%	53	-108
Payette County	22,624	-11	0.0%	123	-135
Valley County	9,638	-146	-1.5%	31	-178
Washington County	10,255	38	0.4%	25	14
4: South Central	187,012	732	0.4%	1,495	-770
Blaine County	21,199	-135	-0.6%	163	-304
Camas County	1,124	16	1.4%	13	2
Cassia County	23,186	95	0.4%	224	-131
Gooding County	15,475	-25	-0.2%	141	-167
Jerome County	22,682	221	1.0%	277	-58
Lincoln County	5,186	-28	-0.5%	57	-85
Minidoka County	20,155	73	0.4%	133	-60
Twin Falls County	78,005	515	0.7%	487	33
5: Southeast	167,325	647	0.4%	1,533	-890
Bannock County	83,691	671	0.8%	810	-138
Bear Lake County	6,001	26	0.4%	14	13
Bingham County	45,952	210	0.5%	470	-261
Caribou County	6,850	-132	-1.9%	23	-158
Franklin County	12,850	52	0.4%	122	-70
Oneida County	4,215	-79	-1.8%	21	-100
Power County	7,766	-101	-1.3%	73	-176
6: Eastern	209,302	1,244	0.6%	2,743	-1,515
Bonneville County	105,772	1,150	1.1%	1,187	-35
Butte County	2,822	-77	-2.7%	17	-94
Clark County	949	-31	-3.2%	10	-41
Custer County	4,333	-37	-0.8%	0	-38
Fremont County	13,128	-120	-0.9%	108	-231
Jefferson County	26,301	86	0.3%	387	-303
Lemhi County	7,967	10	0.1%	-17	27
Madison County	37,864	262	0.7%	902	-651
Teton County	10,166	1	0.0%	149	-149
Source: U.S. Census Bureau					

In 2000 to 2009, four Idaho counties had net natural decrease, meaning that deaths exceeded births, reducing population. All four counties — Clearwater, Idaho, Lemhi and Shoshone — are natural resource-dependent economies with relatively old populations as the result of young families moving out in recent decades. The economic slowdown and continued population aging added five more counties — Boise, Boundary, Gem, Lewis and Nez Perce — to the list of those experiencing net natural decrease between July 1, 2010, and July 1, 2011. Idaho County came off the list. Its

births equaled deaths in the more recent period, while deaths exceeded births by four in an average year between 2000 and 2009. Adams County also had zero natural increase between 2010 and 2011, after adding two people a year from natural increase in the prior nine years.

Natural Change in Idaho Population by Region, County						
	Annual Average 2000-2009			July 1, 2010-July 1, 2011		
	Natural Change	Births	Deaths	Natural Change	Births	Deaths
State of Idaho	12,572	22,890	10,318	11,679	22,954	11,275
1: North	756	2,407	1,651	522	2,457	1,935
Benewah County	20	116	96	-11	108	119
Bonner County	69	405	336	27	385	358
Boundary County	36	134	98	-13	119	132
Kootenai County	671	1,625	954	567	1,715	1,148
Shoshone County	-40	127	167	-48	130	178
2: North Central	232	1,154	922	214	1,162	948
Clearwater County	-21	71	92	-38	63	101
Idaho County	-2	157	159	0	163	163
Latah County	214	426	212	262	454	192
Lewis County	0	43	43	-7	37	44
Nez Perce County	39	456	417	-3	445	448
3: Southwest	6,078	10,082	4,004	5,172	9,569	4,397
Ada County	3,280	5,341	2,061	2,721	5,024	2,303
Adams County	2	32	30	4	29	25
Boise County	21	58	37	-4	49	53
Canyon County	2,084	3,184	1,100	1,886	3,104	1,218
Elmore County	371	527	156	341	517	176
Gem County	38	214	176	-8	177	185
Owyhee County	91	174	83	53	146	93
Payette County	141	326	185	123	318	195
Valley County	34	94	60	31	94	63
Washington County	15	132	117	25	111	86
4: South Central	1,428	2,843	1,415	1,495	2,983	1,488
Blaine County	205	285	80	163	252	89
Camas County	8	14	6	13	15	2
Cassia County	219	402	183	224	416	192
Gooding County	104	241	137	141	252	111
Jerome County	226	371	145	277	430	153
Lincoln County	45	80	35	57	80	23
Minidoka County	153	332	179	133	312	179
Twin Falls County	468	1,119	651	487	1,226	739
5: Southeast	1,674	2,842	1,168	1,533	2,789	1,256
Bannock County	875	1,454	579	810	1,414	604
Bear Lake County	18	80	62	14	88	74
Bingham County	513	801	288	470	785	315
Caribou County	41	103	62	23	96	73
Franklin County	132	219	87	122	211	89
Oneida County	20	59	39	21	59	38
Power County	75	126	51	73	136	63
6: Eastern	2,405	3,563	1,158	2,743	3,994	1,251
Bonneville County	1,123	1,768	645	1,187	1,907	720
Butte County	14	39	25	17	32	15
Clark County	13	18	5	10	11	1
Custer County	3	36	33	0	32	32
Fremont County	131	223	92	108	205	97
Jefferson County	318	442	124	387	521	134
Lemhi County	-14	76	90	-17	73	90
Madison County	685	803	118	902	1,029	127
Teton County	130	157	27	149	184	35

South central and eastern Idaho are the only regions where natural increase between 2010 and 2011 was greater than natural increase in an average year between 2000 and 2009. Altogether 16 counties had larger natural increases in the most recent period than in the average year between 2000 and 2009.

REDUCING THE FLOW OF IMMIGRANTS

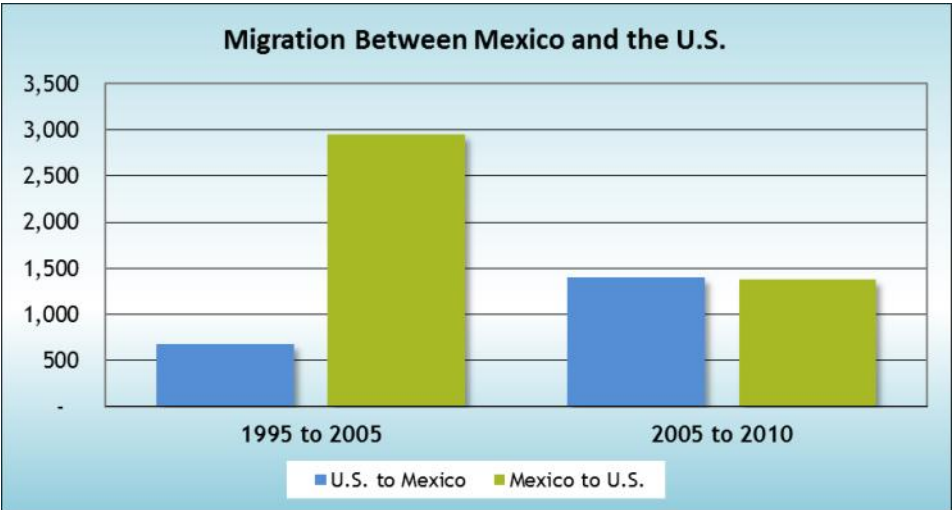
During the recession immigration fell sharply, and it continued to fall during the recovery. The biggest decrease in immigration has come from Mexico.

The largest wave of immigration in human history appears to have come to an end, according to a Pew Research Center report released in late April. Over four decades, 12 million immigrants came to the United States. Migration from Mexico to the U.S. was greater than from any other country in the world. Some 30 percent of all current U.S. immigrants are Mexican-born. China including Hong Kong and Taiwan is the next largest source of immigrants, accounting for 5 percent of the nation’s 40 million immigrants.

Net migration from Mexico has stopped and may even have reversed.

“The standstill appears to be the result of many factors including the weakened U.S. job and housing construction markets, heightened border enforcement, a rise in deportations, the growing dangers associated with illegal border crossings and the long-term decline in Mexico's birth rates,” the Pew report said. As of 2009, a typical Mexican woman was projected to have an average of 2.4 children in her lifetime compared with 7.3 for her 1960 counterpart.

Net international migration to Idaho fell from nearly 2,400 a year between 2000 and 2009 to only 2,074 between July 1, 2010 and July 1, 2011. The biggest decreases were in south central Idaho, down 160, and eastern Idaho, down 135.



Counties with the highest unemployment rates had the lowest in-migration and the highest out-migration.

HINDERING MOBILITY

Americans traditionally are known for their mobility, willing to pull up stakes and move somewhere else in the country. The economic hardships and the changes in the housing market since 2007 reduced mobility sharply. Domestic migration within the United States plummeted after 2008, reaching

Migration In Idaho by Region and County

	2000-2009 Average			July 2010-June 2011		
	Int'l	Domestic	Unemployment Rate	Int'l	Domestic	Unemployment Rate
State of Idaho	2,391	13,197	4.8	2,074	62	8.8
1: North	44	2,755	6.4	65	1,154	11.2
Benewah County	3	-10	9.5	0	-68	13.2
Bonner County	7	356	6.6	16	-158	12.1
Boundary County	1	65	8.3	1	-201	14.7
Kootenai County	30	2,404	5.8	44	1,594	10.4
Shoshone County	3	-60	9.5	4	-13	14.3
2: North Central	91	131	5.3	84	429	8.1
Clearwater County	1	2	11.0	7	-15	15.0
Idaho County	5	65	7.6	0	154	10.9
Latah County	57	-54	4.0	50	79	7.2
Lewis County	1	8	4.5	2	5	6.0
Nez Perce County	28	109	4.6	25	206	6.9
3: Southwest	1,135	8,922	4.8	1,130	2,449	9.2
Ada County	608	5,585	4.1	636	3,997	8.4
Adams County	5	50	10.0	0	18	16.5
Boise County	12	11	4.9	12	1	9.7
Canyon County	343	3,617	5.5	331	80	10.7
Elmore County	24	-649	5.4	37	-1,131	8.5
Gem County	29	109	6.0	14	-9	11.1
Owyhee County	64	-58	3.1	33	-141	4.8
Payette County	18	65	7.0	41	-176	9.2
Valley County	5	214	7.1	10	-188	15.8
Washington County	27	-22	6.2	16	-2	10.0
4: South Central	612	274	4.2	452	-1,222	8.0
Blaine County	123	-47	3.7	89	-393	8.9
Camas County	1	7	4.3	1	1	11.3
Cassia County	56	-158	4.7	30	-161	6.8
Gooding County	61	-43	3.6	17	-184	6.9
Jerome County	74	93	4.1	96	-154	8.1
Lincoln County	23	50	5.2	0	-85	13.0
Minidoka County	91	-274	5.7	9	-69	7.5
Twin Falls County	182	646	4.0	210	-177	8.1
5: Southeast	210	-734	4.4	177	-1,067	7.4
Bannock County	60	-240	4.6	94	-232	7.9
Bear Lake County	1	-63	4.2	3	10	6.2
Bingham County	82	-233	4.2	33	-294	7.0
Caribou County	7	-88	5.1	16	-174	7.6
Franklin County	23	-1	3.5	21	-91	5.4
Oneida County	2	-9	3.3	0	-100	5.0
Power County	35	-101	5.5	10	-186	9.3
6: Eastern	301	1,848	3.7	166	-1,681	6.9
Bonneville County	92	998	3.4	100	-135	6.6
Butte County	5	-26	4.4	0	-94	6.2
Clark County	18	-38	4.8	2	-43	8.5
Custer County	2	-3	5.1	1	-39	7.1
Fremont County	45	-30	4.6	10	-241	9.2
Jefferson County	31	371	3.7	14	-317	7.3
Lemhi County	6	15	6.6	2	25	9.9
Madison County	44	313	3.1	31	-682	5.8
Teton County	57	249	3.0	6	-155	7.3

its lowest level since the government began tracking it in the 1940s. Millions of Americans have become frozen in place because they are unable to sell their homes and unsure where they would find jobs elsewhere. At the same time, international migration slowed as prospective immigrants decided it was not a good time to move to the U.S.

Americans may not have moved as much during the recession and the sluggish recovery because there were so few areas with jobs. Unemployment rose throughout the U.S. so there were not many ideal places to move. Even

now that the economy has improved, only a few standout areas promise jobs – North Dakota, Texas and the Washington, D.C., area.

The sharp decrease in American mobility since the recession began follows a gradual decline during the last two decades. Probably the biggest reason is the aging of the population. Older Americans are less likely to move than younger ones. Also making Americans more likely to stay put is the rise of dual-income families. If a sole earner loses a job, it’s relatively easy for a family to pack up and move to a place with more employment opportunities. But if one member of a two-income family loses a job, the family is more likely to stay put and hold onto the remaining job for dear life.

Another factor that made Americans less likely to move in the last decade is the increase in home ownership. Renters are three times as likely to move in a given year as homeowners. The aftermath of the housing bubble is eroding that hindrance to mobility. The home ownership rate rose from 64.2 percent in 1990 to about 66.2 percent in 2000 and then more sharply during the housing bubble to a peak of 69.2 percent at the end of 2004. It has fallen steadily since the bubble burst in 2006. It hit 65.4 percent at the end of March, the same level as in early 1997.

Idahoans also saw a reduction in mobility. In-migration that had been so strong in the previous decade narrowed to a trickle.

Residency - Idaho, U.S. 2010		
Percent of residents at least 1 year of age in	Idaho	US
Same house one year ago	82.5	84.6
Same state one year ago	13.5	12.6
Different state one year ago	3.6	2.2
Abroad one year ago	0.4	0.6

Source: U.S. Census Bureau

Of Idaho’s six regions, only one saw an increase in domestic migration between July 2010 and July 2011 compared to the average migration between 2000 and 2009. Latah County, where the University of Idaho was increasing enrollments, went from losing 54 people a year in the previous nine years to adding 79 between 2010 and 2011. Nez Perce County, which draws many retirees from surrounding areas and where fast-growing Lewis-Clark State College draws many young people, doubled its net in-migration from 109 per year to 206. Idaho County also increased its domestic migration from 65 a year to 154.

Other counties that saw increased in-migration were Bannock, Lemhi, Washington, Shoshone, Bear Lake and Minidoka.

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See Table showing average movement in and out of Idaho 2006-2010 on page 15.

Average Movement In and Out of Idaho, 2006-2010

Moved from Idaho in Last Year To		Moved to Idaho in Last Year From	
Washington	12,661	Washington	10,876
Utah	7,692	California	8,932
California	5,719	Utah	8,014
Oregon	4,129	Alaska	3,264
Arizona	2,147	Oregon	3,202
Texas	2,033	Arizona	3,086
Nevada	1,686	Nevada	2,110
Montana	1,458	Texas	1,746
Virginia	1,159	Montana	1,509
Wyoming	942	Wyoming	1,410
Wisconsin	902	Colorado	1,372
Alaska	895	Tennessee	1,153
Florida	884	Iowa	773
Colorado	839	Oklahoma	711
Missouri	830	New Mexico	694
Indiana	772	Florida	612
New Mexico	755	Virginia	611
North Carolina	724	Minnesota	465
Arkansas	618	Michigan	427
Oklahoma	611	Missouri	425
Ohio	564	Kansas	422
South Dakota	457	Alabama	376
Georgia	414	Ohio	325
Kansas	398	Kentucky	315
Pennsylvania	380	Georgia	313
Maryland	357	South Dakota	296
Tennessee	333	Wisconsin	233
Iowa	315	Puerto Rico	233
Illinois	313	Maine	202
Alabama	304	Pennsylvania	172
South Carolina	233	Illinois	169
Minnesota	231	New York	155
Louisiana	202	District of Columbia	144
New York	198	North Carolina	134
Connecticut	147	West Virginia	133
Nebraska	127	Indiana	132
Mississippi	121	Hawaii	123
New Jersey	91	Massachusetts	115
West Virginia	88	New Hampshire	109
Massachusetts	79	New Jersey	97
Kentucky	71	North Dakota	96
North Dakota	69	Louisiana	59
Michigan	66	Arkansas	45
New Hampshire	66	Maryland	44
Hawaii	42	Mississippi	37
Delaware	0	U.S. Island Area	36
District of Columbia	0	South Carolina	0
Maine	0	Connecticut	0
Rhode Island	0	Nebraska	0
Vermont	0	Delaware	0
Puerto Rico	0	Rhode Island	0
U.S. Island Area	0	Vermont	0

Source: U.S. Census Bureau

LABOR UNIONS EXPERIENCE DECLINES IN IDAHO, U.S.

The history of organized labor dates back to the late 18th Century. Printers were the first to go on strike in New York in 1794. The fight for shorter hours and higher pay was escalating, and by then end of the century three more labor organizations walked out on employers – cabinet makers in 1796, carpenters in 1797 and shoemakers in 1799.

In the early years of the 19th Century, efforts by unions to improve working conditions through either negotiation or strike became more frequent. By the 1820s various unions involved in the effort to reduce the working day from 12 to 10 hours began to show interest and the idea of a federation — joining together to pursue common objectives for working people — grew strong.

The National Labor Union was formed in 1866, and the Knights of Labor came along three years later but was eventually disbanded after a riot resulting in the death of police officers.

The American Federation of Labor was founded in 1886 and more than a century later merged with the Committee for Industrial Organization to form what is known today as the AFL-CIO. Both organizations remain committed to the principals on which they were founded.

“To protect the skilled labor of America from being reduced to beggary and to sustain the standard of American workmanship and skill, the trades unions of America have been established,” declared AFL founder Samuel Gompers.

But over the last quarter century there has been a steady decline in both union membership and influence. Nationally, union members accounted for 20.1 percent of employed wage and salary workers in 1983, the first year for which comparable data were available. It was just under 12 percent by 2010.

There are several reasons for the decline. The shift toward technology and service has led today’s workers to be more educated, favoring professional, white collar jobs that have made the economy less reliant on the industrial jobs that tended to be union strongholds.

Possibly the most important reason for the decline in unions is that unions negotiated wage increases substantially above those for nonunion workers so many union-made products became more expensive and sales were lost to less expensive, nonunion producers. These have often been foreign competitors. Some companies responded by cutting back production, which eliminated jobs and resulted in a decline in union membership.

According to national data from the U.S. Bureau of Labor Statistics, union members working in the private sector earn almost 23 percent more than non-union private sector workers. In the public sector union workers earn on average 21 percent more than non-union government workers.

Another factor in waning union membership is declining firm size. Many smaller businesses are unable to afford to pay their employees union wages so they remain ununionized, further deteriorating membership. Since 1990, the number of businesses with four or fewer employers has grown while businesses in all other employee-size categories have declined.

Other reasons remain political.

There were 31 national labor unions organized in Idaho representing 156 local chapters and 42,000 members as of 2010. Over a quarter of the local chapters in Idaho are in northern Idaho, and only nine of them represent public employees. Local chapters representing private employees include the United Steel Workers, the Communication Workers of America and unions of electrical workers, machinists, bricklayers and plumbers and pipefitters.

Union membership grew stronger as the recession settled in. In just a year, the number of members in Idaho unions increased nearly 17 percent from 36,000 in 2009 to 42,000 in 2010. That was 7.1 percent of wage and salary workers. Due to privacy and disclosure agreements, it is unknown which unions grew in membership.

That number has fluctuated over the years, peaking at 10.2 percent in 1993. And from 1999 to 2005, the number of union members as a percentage of employed plummeted from 9.2 percent to 5.2 percent – the trough of the 20-year data series.

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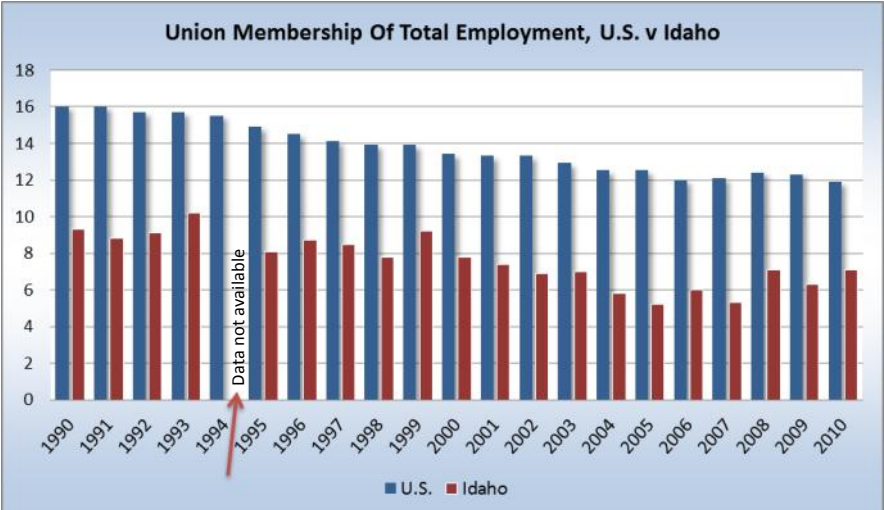
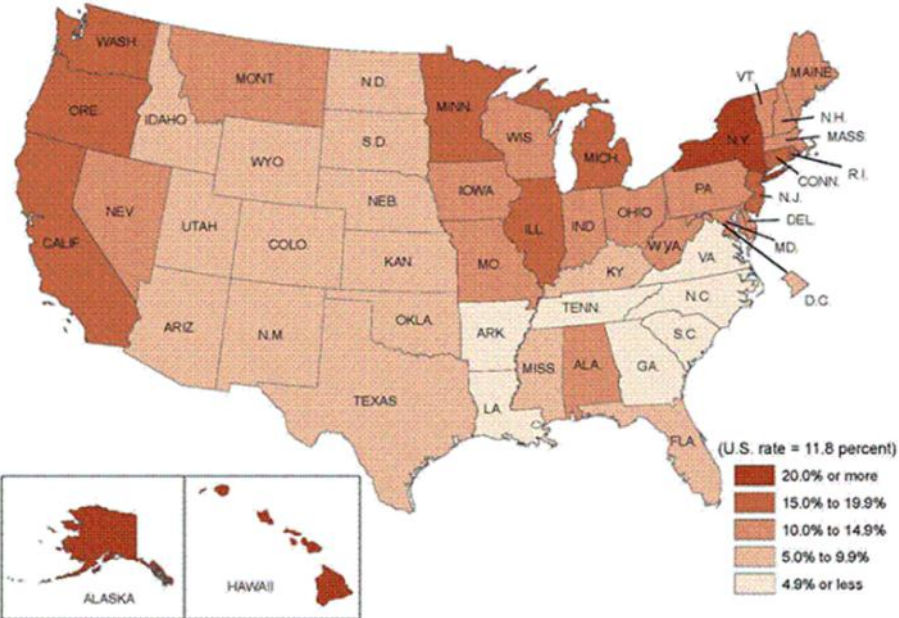


Chart 2. Union membership rates by state, 2011 annual averages

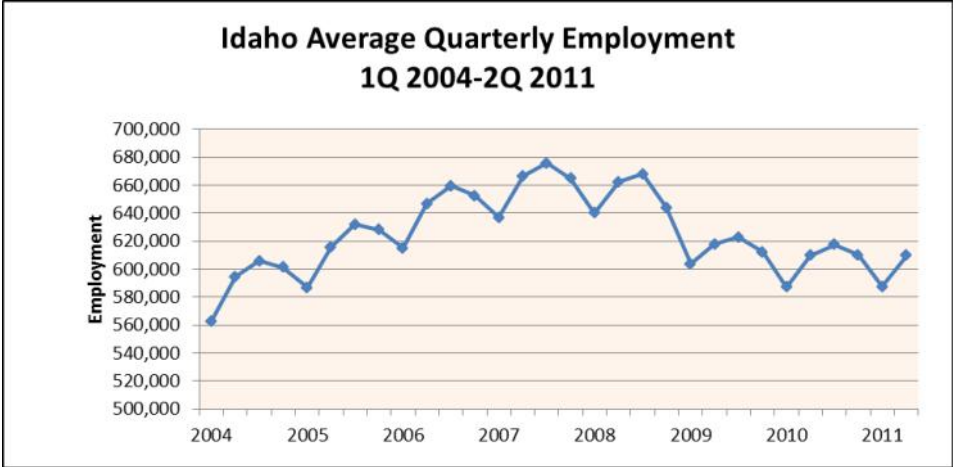


IDAHO PRIVATE EMPLOYMENT CONTINUES TO SHOW SLIGHT IMPROVEMENT

EMPLOYMENT

The Idaho economy continued to maintain jobs above year-earlier levels during the second quarter of 2011. The Quarterly Census of Employment and Wages showed employment averaged 609,770 in the April-June quarter, 114 jobs higher than in the second quarter of 2010. There were 587,410 jobs in the first quarter of 2011 due to seasonal gains in many sectors.

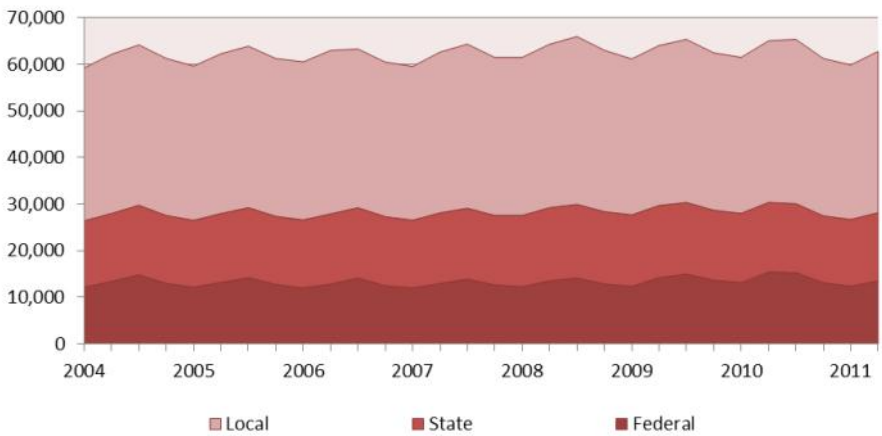
The first quarter of 2011 was the first in three years to show a year-over-year increase in total jobs following five quarters of deficits. Though the gains in the first and second quarters were small, the fact that they persisted for two quarters was a good sign. In the second quarter, the over-the-year gap in goods production was finally eliminated after 15 straight quarters of deficits. The year-over-year gap of -0.5 percent in the first quarter was closed to zero in the second. The gain in the service sector, however, shrank from 0.15 percent in the first quarter to 0.03 percent in the second.



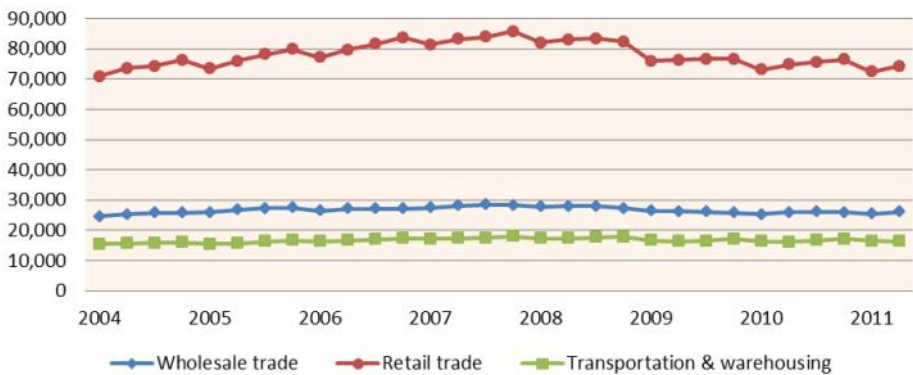
Private-sector jobs totaled 496,283 in the second quarter, up over 19,000, or 4 percent, from the first quarter. This helped private sector employment remain above the year-earlier level for the third quarter in a row. The gain was 3,735 jobs, or 1 percent, in the second quarter. Government including education averaged 113,487 jobs in the second quarter, which was 2.9 percent above the prior quarter but 3.1 percent below the second quarter 2010. The quarter’s gain in government employment was at all levels despite local education losing 195 jobs from the first quarter. Overall, local government gained 1,279 jobs while state government picked up 770 jobs and federal government gained 1,168 jobs, primarily in the Bureau of Land Management and Forest Service.

The April-June quarter brought seasonal gains in retail jobs – over 1,800 jobs, or 2.5 percent, from the first quarter to total 74,253 jobs. That was 509 below the second quarter of 2010 so the over-the-year deficit edged downward, from -0.8 percent to -0.7 percent. Four out of 12 retail subsectors saw second quarter employment higher than the year before. Transportation and warehousing experienced a fractional quarterly decline but ended up 0.9 percent from the second quarter of 2010. Wholesale trade had the same year-over-year gain after rising 2.5 percent from the first quarter.

Government 1Q 2004-2Q 2011

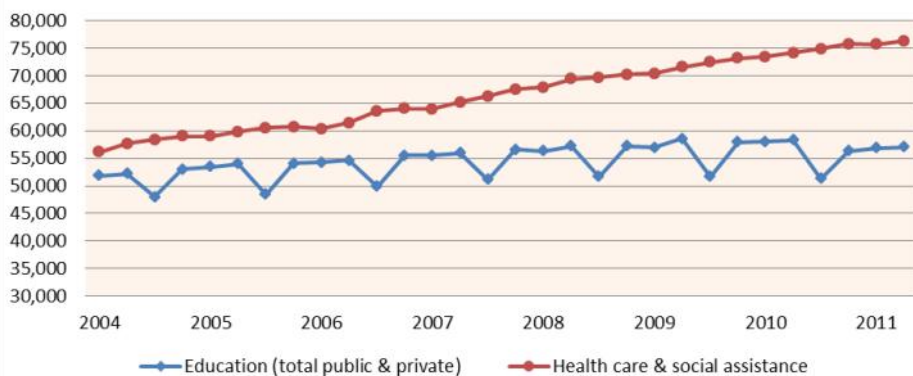


Trade & Transportation 1Q 2004-2Q 2011



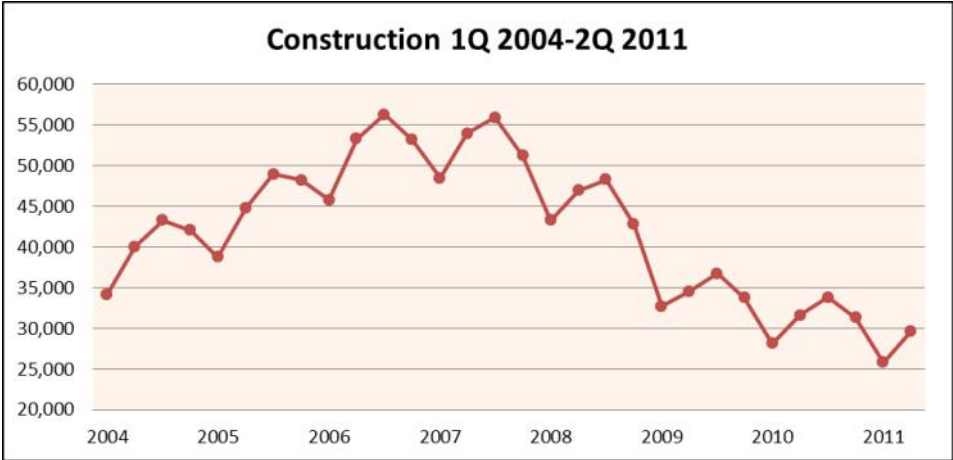
Health care returned to over-the-quarter gains in the second quarter after a slight loss in the first three months of 2011. Health care jobs totaled 75,679, 0.8 percent higher than the first quarter and 2.9 percent ahead of the second quarter 2010.

Education & Health Services 1Q 2004-2Q 2011

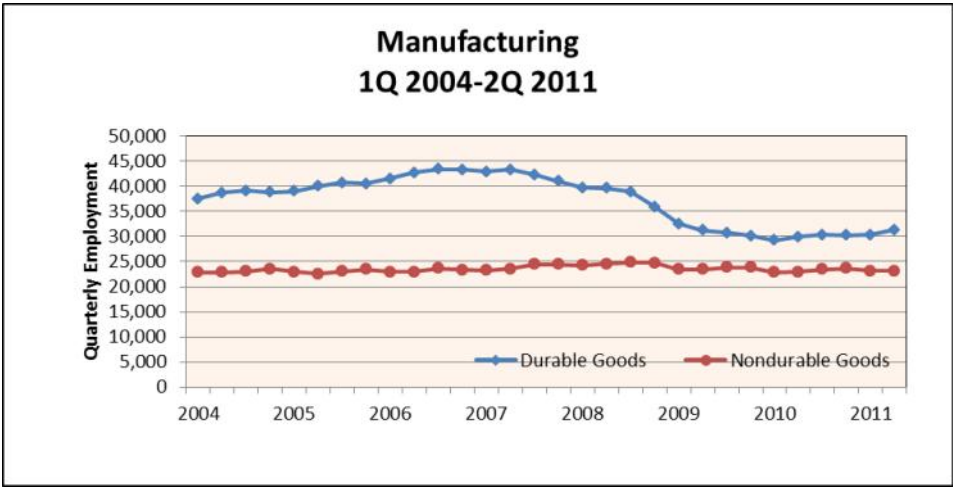


Construction experienced a seasonal second quarter gain of over 3,800 jobs, or 14.9 percent, from the first quarter. After a slight increase at the beginning of 2011, the year-to-year deficit slipped from 8.3 percent in the first quarter to 6.2 percent in the second. Over-the-quarter gains were spread

across all construction subsectors, but employment levels in all subsectors remained below year-earlier levels.



Manufacturing employment edged up over 900 from the first quarter to the second, a seasonal increase of 1.8 percent. The over-the-year manufacturing job gap had disappeared in the fourth quarter of 2010 when jobs matched the number at the end of 2009. This positive trend continued in the second quarter 2011 at 3.1 percent above the previous year. Over the year durable goods was up 4.6 percent in the second quarter while nondurables were 1.1 percent ahead of the second quarter of 2010. Nine manufacturing subsectors experienced over-the-year gains.



WAGES

During the second quarter of 2011, Idaho’s average weekly wage for all industries was \$667, up \$8 from the previous quarter. The lowest wages were reported in accommodations and food services at \$255 a week, a \$3 increase from the first quarter, and leisure activities at \$296, an \$8 decrease. Company management continued to pay the highest wage at \$1,398 a week. Mining followed at \$1,261, and utilities came in at \$1,225.

Total wage levels saw a seasonal increase from the first quarter of over \$250 million, or 5.1 percent. Total wages in the second quarter were 2.4 percent higher than the previous year – the fifth over-the-year increase in total wages since the fourth quarter of 2008. *See chart on page 21.*

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Average Weekly Wages by Industry 2nd Quarter 2011

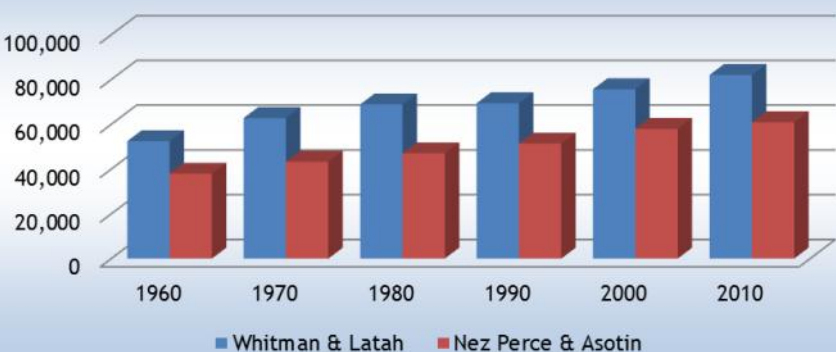


TWO COUNTIES DRIVE ECONOMIC ENGINES OF THE PALOUSE

Latah County is closely tied to its Washington neighbor, Whitman County. Both are on the rolling hills of the Palouse and its rich volcanic soil that produces bumper crops of wheat, peas, lentils and barley. Both center on university towns – Moscow and Pullman – with youth-skewed demographics, high levels of education and cultural amenities generally found only in large urban areas. Increases in enrollments mainly determine population and economic growth. The need for housing a burgeoning student population and construction and rehabilitation of college buildings drive Local construction. The universities are the major draw for visitors from parents' weekends, sports, concerts and arts events to conferences at the schools and doing business with them. The presence of two major research universities within eight miles of each other means the counties are home to a growing number of technology transfer companies – businesses that grew from university research.

The ties and similarities between the two counties are so strong that almost anything that affects one affects the other. They also are the biggest

Population

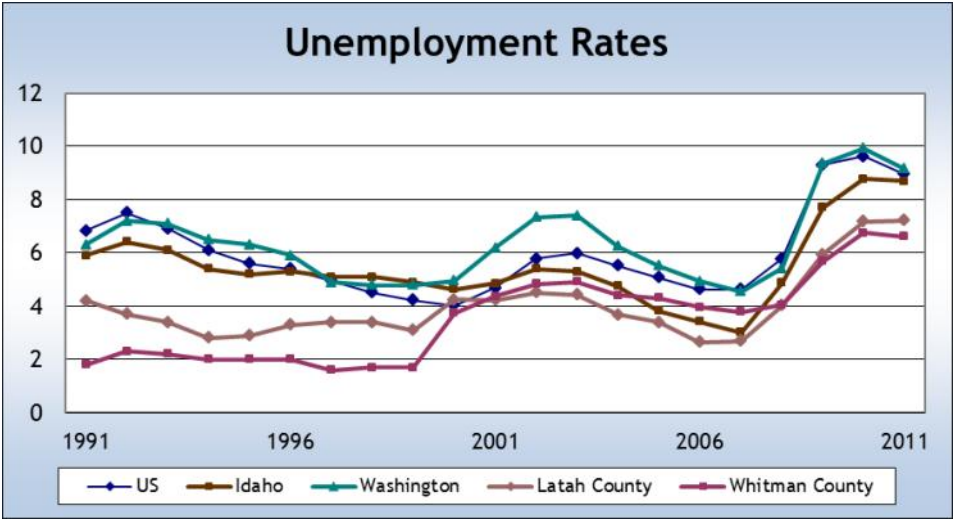


economic unit in the nine counties of north central Idaho and southeastern Washington. Together, the counties currently have a population of about 83,000, larger than the Lewiston-Clarkston metropolitan area of Nez Perce County, Idaho, and Asotin County, Wash.

With thousands of college students living there, the counties have a different age make-up than most areas, as shown by the table below.

2010 Population By Age		
	Whitman- Latah Co.	United States
Under 15 years	13.9%	20.1%
15 to 29 years	42.4%	21.1%
30 to 44 years	14.3%	20.0%
45 to 59 years	15.3%	21.0%
60 to 74 years	9.5%	12.5%
75 years and over	4.6%	6.1%

The stability of the universities and the agricultural sector helped the Palouse economy remain relatively strong since the recession began in 2007. Although unemployment doubled in both counties, their rates remained far below unemployment rates in the states and the nation. This March, Whitman County had the lowest unemployment rate in Washington at 6.9 percent. Latah County's seasonally adjusted rate was 6.5 percent, significantly below the Idaho rate of 7.9 percent and the U.S. rate of 8.3 percent.



The counties' gross regional products are both over \$1 billion. Because the universities are state colleges, their employment and their impact on the economy show up in the government sector rather than educational services, which are private operations.

In addition, there is substantial interaction between the two counties. Many people live in one of the counties and work in the other.

Commuting Patterns 2009

Where Latah County People Work		Where Latah County Workers Live	
Total	14,176	Total	12,082
Moscow	7,234	Moscow	6,306
Pullman	2,339	Lewiston	711
Lewiston	908	Pullman	606
Potlatch	220	Potlatch	413
Princeton	154	Troy	393
Kendrick	104	Deary	311
Clarkston	96	Genesee	197
Colfax	92	Clarkston	197
Genesee	91	Kendrick	147
Deary	67	Princeton	137
Orofino	48	Viola	127
St. Maries	45	Harvard	61

Source: Local Employment Dynamics, U.S. Census Bureau

AGRICULTURE

Farming – especially raising wheat, lentils, dry peas and barley – is the mainstay of most communities on the Palouse. Agriculture was one of the two bright spots in the Palouse economy last year. Commodity prices were high, and yields were above average despite a late start to the growing season. Although prices are expected to be a little lower this year and costs are rising, this should be another profitable year for farmers if weather does not harm crops. A good year for farmers helps retailers, wholesalers and service providers.

In an average year, the two counties produce more than 35 million bushels of wheat and 10 million bushels of barley.

In the 1970s and 1980s, the Palouse was billed as the Pea and Lentil Capital of the World, producing more than 95 percent of the lentils grown in the U.S. and the vast majority of dry peas. In the 1980s, varieties of lentils and peas were developed that could grow well in places where the crop had not been grown before. In the 1990s, North Dakota and Montana began growing peas. By 2002, North Dakota produced 47 percent of the total U.S. crop followed by Washington at 31 percent, Idaho at 15 percent, Montana at 5 percent and Oregon at 2 percent. At the same time, many regions around the U.S. and the world began growing lentils. Although the Palouse has lost dominance, peas and lentils remain important crops. The U.S. Pea and Lentil Council is headquartered in Moscow, and Pullman still hosts the National Lentil Festival.

Garbanzo beans are becoming a more important crop. Two years ago, Bronzestones, a maker of humus, opened at the Port of Wilma across the Snake River from Clarkston in Whitman County. Last year, Pacific Northwest Farmers Cooperative, which serves the Palouse, opened a certified processing center for garbanzos in Genesee.

The counties' newest crop is grapes grown at the Colter's Creek winery near the confluence of the Clearwater and Potlatch rivers. The vineyard's owners plan to open a tasting room this June in 100-year-old building they are renovating in Juliaetta. They will soon hire a couple of people to work at both the tasting room and the five-year-old winery.

Gross Product 2010		
	Latah Co.	Whitman Co.
Total	\$1,015,671,336	\$1,484,890,903
Agriculture, Forestry, Fishing and Hunting	\$94,395,203	\$60,035,667
Mining	\$4,545,733	\$1,945,007
Utilities	\$3,127,002	\$28,807,158
Construction	\$32,416,351	\$25,155,223
Manufacturing	\$32,390,783	\$263,235,506
Wholesale Trade	\$27,452,336	\$59,998,772
Retail Trade	\$82,645,976	\$60,933,629
Transportation and Warehousing	\$10,865,376	\$24,031,747
Information	\$30,402,882	\$17,192,130
Finance and Insurance	\$34,223,476	\$117,684,842
Real Estate and Rental and Leasing	\$70,828,248	\$52,214,880
Professional, Scientific and Technical Services	\$58,873,409	\$30,829,548
Business Services	\$13,356,438	\$7,910,484
Educational Services	\$7,776,822	\$1,026,411
Health Care and Social Assistance	\$74,759,117	\$71,640,595
Arts, Entertainment, and Recreation	\$5,034,588	\$5,383,489
Accommodation and Food Services	\$36,025,332	\$32,683,324
Other Services	\$19,688,664	\$15,544,191
Government	\$376,863,600	\$608,638,300
Source: Economic Modeling Specialists Inc.		

UNIVERSITIES

The Latah-Whitman economy has been shaped by the growth of the universities. In 1889, the state of Idaho picked Moscow for the state's land grant institution, the University of Idaho. A year later, Washington established its own land grant institution just across the state line at Pullman. As their enrollments grew, the local retail and service sectors grew as well.

Although the universities, especially Washington State University, have undergone severe cuts in state funding in the last four years, they managed to keep job losses down by increasing enrollments, raising tuition and gathering more research funding. The budget cuts may have finally come to an end. At its 2012 session, the Idaho Legislature slightly increased higher education funding. The supplemental budget passed by the Washington Legislature this spring was the first not to include cuts for higher education since 2007. Washington State saw its state appropriation reduced by 52 percent between 2007 and 2011.

The University of Idaho has 4,800 people on its payroll, providing nearly one in three of the payroll jobs in Latah County. That is about the same number as in 2007. Washington State University employs about 7,000 people, which is slightly less than one in three of the jobs in Whitman County.

MANUFACTURING

While the U.S. lost 4.7 million manufacturing jobs, or 29 percent, between 2001 and 2011, manufacturing employment more than doubled in the Latah-Whitman area in the last decade from 1,138 in 2001 to 2,503 in 2011. Most of the growth came from Schweitzer Engineering Laboratories that now employs more than 1,800 people on its Pullman campus. Latah County also bucked the national trend of manufacturing job losses, adding 88 jobs over the 10 year

period to employ 534 people in 2011. Although Latah County's wood product sector was hit hard in the mid-2000s by the national housing crisis, employment has returned to its prerecession level of 210 jobs. A variety of equipment manufacturers are responsible for the 88 jobs that have been added.

Schweitzer Engineering, which makes products that minimize blackouts and electrical system damage, has rapidly expanded its markets and expects to continue to grow at a strong clip for years to come.

At the start of the year, Diligent, which designs and manufactures circuit boards for engineering students, announced it will expand into a 15,000-square-foot office in a building owned by the Port of Whitman to increase its shipping space. Diligent's inexpensive boards allow students to configure circuits on programmable chips for calculators, video games and MP3 players or write programs that make microprocessor chips control similar devices. Diligent grew from 19 employees two years ago to more than 40 today. Over half work at its Pullman plant and headquarters while the rest work at engineering and sales offices in China and Romania. Its boards are manufactured in China. Diligent sells products at more than 1,000 universities in over 70 countries. It also sees hobbyists as a potential market.

Decagon Devices broke ground on a 27,000-square-foot addition last winter that will nearly double the size of its plant in the Pullman Industrial Park. The technology transfer company has steadily grown over the last six years from 55 employees to 100 today. The company develops and manufactures scientific instruments that measure water activity in food and moisture in soil. One of Decagon Devices' products, a thermal and electrical conductivity probe, went to Mars to measure humidity and wind speed. Demand has risen for its food instruments as consumers spend more at the grocery store instead of buying restaurant meals and as commodity prices climb, making food processors more careful in monitoring ingredients.

With the University of Idaho trying to increase technology transfer – the creation of companies that use technology or make products developed by university researchers – Latah County hopes to expand and diversify its manufacturing sector considerably over the next 10 years. In addition, Potlatch is developing a recreational park that it expects to attract recreational-technology companies that make ammunition, rifles and other equipment for hunting, fishing, boating, camping and other outdoor activities. PNW Arms, which makes ammunition, moved to Potlatch last fall and already is expanding its employment.

CONSTRUCTION

After peaking in 2007 at 1,870 jobs, construction has fallen continuously, dropping 31 percent, or 1,290, from 2007 to 2011. U.S. construction employment dropped 28 percent in the same period. Single-family home construction continues to be far below prerecession levels, but commercial construction is fairly robust.

Commercial construction in Whitman County could run 20 percent to 30 percent higher than in recent years. Washington State University began an \$80 million update to Martin Stadium toward the end of 2011. Schweitzer Engineering Laboratories, which added a new building to its campus last year, is planning to build another facility there this year. Cooperative Agricultural

Producers, a farmer-owned cooperative on the Palouse, has plans to build a rail spur line and commercial grain operation on Washington Highway 271 between Rosalia and Oakesdale. In Pullman, the Hilltop Inn is planning a 54-room expansion, Hampton Inn is planning a 93-room hotel near Walmart and the Holiday Inn Express is getting a \$456,000 face-lift. The university's record enrollment has prompted a spike in multifamily residential developments that may lead to a 420-unit increase in apartments in Pullman.

First Wind broke ground on the Palouse's largest construction project May 1. Fifty-eight wind turbines near Oakesdale in northern Whitman County, costing \$210 million, will employ 150-200 workers this summer and eight once they begin operating in October.

In Moscow, Fairfield Inn and Suites is building a 73-room hotel, which should open this fall. Next door, a 7,500-square-foot AutoZone store is under construction. Work on the Intermodal Transportation Center between the University of Idaho campus and downtown will begin soon as will more work on the Legacy Crossing urban revitalization project that will bridge the two areas. Some apartment construction is expected this summer.

SERVICE-PROVIDING SECTORS

The vast majority of tourism is tied to events at the universities. Tight budgets at colleges across the nation resulted in less business travel and fewer academic meetings over the last few years. But there seems to be a slight increase recently in business and academic visitors. Given the high level of hotel construction this year, companies are expecting strong growth in the next few years.

Local governments lost 126 jobs between 2009 and 2011, falling 3.5 percent. About 70 of those job losses came from the Washington side.

While other sectors were struggling, health care and social assistance grew 10.3 percent, adding 341 jobs between 2007 and 2011.

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PERSONAL INCOME GROWTH IN 2010 GOOD NEWS FOR MOST OF IDAHO

Idaho personal income grew 4 percent in 2010 even as the sluggishness of the recession hung on. But that statewide growth, 13th best nationally, was overshadowed by regional increases, specifically in south central Idaho where personal income rose 6.1 percent and north central Idaho where it was up 4.6 percent. The south central regions continues to see a retail and manufacturing recovery, serving a quarter of a million consumers from the surrounding rural areas. Food processing has developed dramatically, piggy-backing on the big commodity producers in the area.

While regular wages and salaries along with business profits account for most of personal income, the other components are investment earnings such as interest, dividends and rental payments and transfer payments such as Social Security, pensions, unemployment benefits and other types of compensation for which no work is done.

Southeastern Idaho's personal income grew the least at just 3 percent, likely due to the lack of economic diversity and the substantial state budget

cuts imposed on Idaho State University, a major component of the regional economy. There are continued successes by economic development professionals in the drive to diversify the economy. A large-scale manufacturer of polysilicon chips continues pushing toward production, a custom metal manufacturer is expanding and a major insurance company call center has located in the area. But the per capita income remains depressed, about 14 percent lower than the statewide per capital income, and it ranked second lowest in the nation. Only Mississippi had a smaller per capita income in 2010.

Eastern Idaho continued to climb up the personal income ladder on the strength of research work and waste cleanup at the Idaho National Laboratory. The area also benefits significantly from tourism in Yellowstone National Park, which had a solid year in 2010 with approximately 3.6 million visitors. The continued growth of Brigham Young University-Idaho in Rexburg has offered another economic boost, expanding the region's population and maintaining construction activity when the bottom had fallen out of that sector almost everywhere else.

Eastern Idaho has the second highest ratio of income from net earnings, indicating there are high-paying jobs with only average levels of income derived from investments.

The INL is behind the significantly high level of workers in eastern Idaho and especially Idaho Falls with postsecondary education. The share of workers with education beyond high school increased 9 percent from 2007-2010.

Over the Great Recession – 2008, 2009 and 2010 – personal income lost ground only in the southwestern region of the state, dropping 2 percent while rising 2.1 percent statewide. Much of this was due to losses in computer chip manufacturing at Micron Technology Inc. in Boise and the ripple effect those thousands of layoffs had on the supply chain. The decline was magnified by the collapse of the housing bubble, which had been extremely lucrative for builders and developers dealing with a corps of speculators at various points.

North central Idaho experienced tremendous growth at 8.8 percent over the recession years with new manufacturing in ammunition and custom metal products contributing. Transfer payments continue to make up a larger share of personal income than in any other region but the Panhandle. The population is older on average in this region, and less of the population growth is attributed to natural causes over immigration.

Northern Idaho has the highest percentage of income coming in from transfer payments due to the seasonal aspects of logging and the problems the mills and mines have run into over the last several decades – logging restrictions, lumber imports and low housing starts. High unemployment has been the status quo for years. In the past, the workforce in this region has not been very mobile, generally eschewing jobs in other industries or states.

South Central Idaho has the highest percentage of investment earnings due to the affluence of the Wood River Valley anchored by Sun Valley. In good years dairy farmers do their part as well on the investment side, but 2010 was not one of those years. South central Idaho has the highest per

capita income once again due to the wealth of the Wood River Valley, stretching from Bellevue north to Ketchum and Sun Valley. The area is awaiting its big recovery from the recession so new hotel projects can commence. Four have been on the backburner since 2007 when they met various zoning, affordable housing and aesthetic design requirements.

Net earnings – wages and business profits – are the highest as a percentage of total personal income in southwestern Idaho, the state’s government, finance and population center. The region also accounts for the bulk of the state’s immigration. The comparatively low percentage of transfer payments indicates a diversified economy with more emphasis on working than on retirements, unemployment and similar assistance. Comparatively low investment earnings reflect a younger population with higher cost-of-living expenses that limit disposable income available for investments.

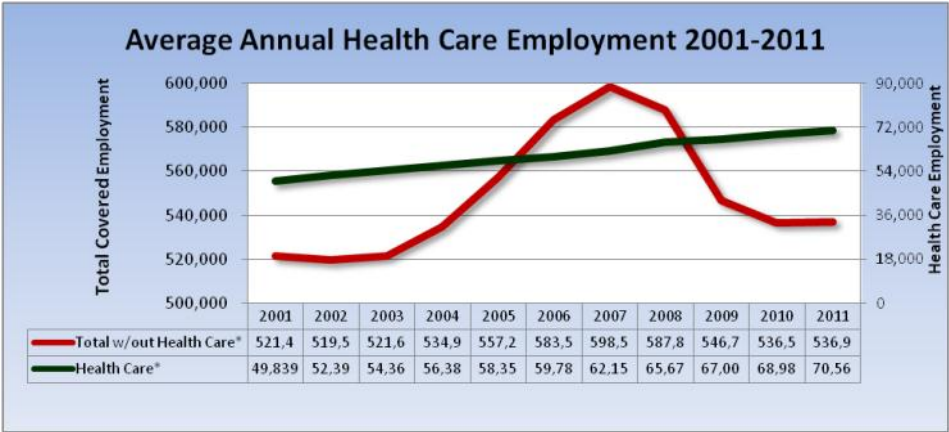
Statewide a few big players such as Micron, the Tamarack Resort in Valley County and reduction in personnel at Mountain Home Air Force Base have combined to adversely affect the state’s recovery.

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HEALTH CARE INDUSTRY REMAINS SOLID IN IDAHO

Through the worst recession to hit Idaho in generations, the health care industry stands out. While other sectors flat lined at best and suffered severe decreases at worst, health care posted steady growth. This growth along with a higher annual wage explains why two out of the top three ‘hottest’ industries for the state are in health care.

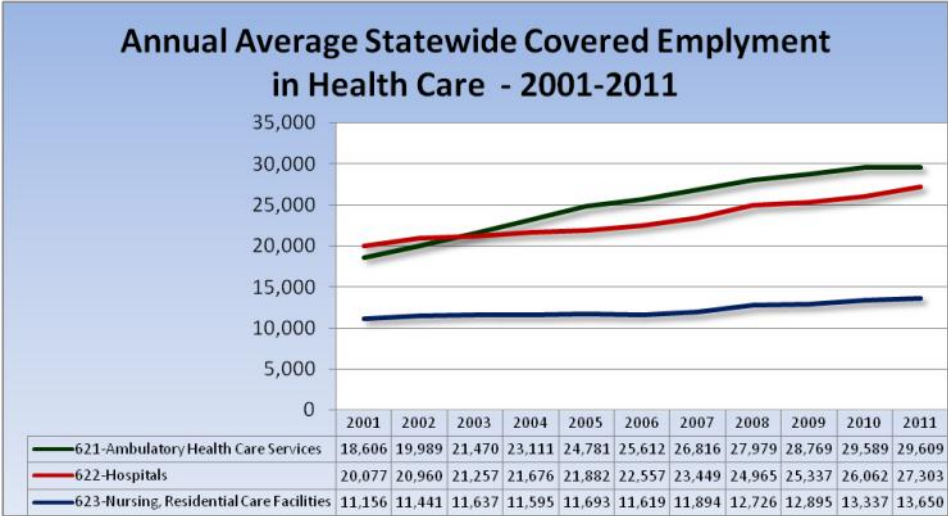
Figure one shows annual average covered employment in the health care industry for the past decade. From 2001 to 2011, health care increased 42 percent adding over 20,700 jobs to its ranks. During the same time period, Idaho’s covered employment minus health care grew by only 3 percent or almost 15,500 jobs. This drastically different growth rate lead to health care rising from a little less than 9 percent of Idaho’s covered employment in 2001 to 13 percent by 2011.



Not all components of the health care sector grew at an equal rate, however. Ambulatory health care services made up 53 percent of the health care industries growth increasing its ranks by over 11,000. Hospitals made up the next largest portion of the industries total growth, making up little over a third followed by nursing and residential care facilities which made up 12

percent of the growth. Nursing and residential care facilities, even though they made up the smallest portion of health care’s past growth, still grew faster than the state adding 22 percent to their payrolls.

Interestingly, ambulatory health care services, which focus on providing outpatient services, overtook hospitals as the largest health care industry employer. Going back as far as 1991, hospitals had the largest share of the workforce, but in 2003 ambulatory health care services over took them and now make up 42 percent of the health care industry.



Regionally, health care employment grew the fastest and the most in southwestern Idaho, increasing by almost 49 percent. The eastern region was next at 47 percent followed by northern Idaho at 40 percent. As was the case with the state, regional health care outpaced all other sectors combined. But in three of the regions – northern, eastern and south central – non-health care employment growth did surpass health care gains. Without the growth that health care experienced in the past decade, southeastern Idaho would have lost over 2 percent of its jobs. North central Idaho was still negative even with the addition of health care, but it did mitigate more than half of the losses from other industries.

Regional Health Care* Covered Employment Growth 2001 - 2011					
		2001	2011	Total Change	Percent Change
North Central	Health Care	4,361	5,533	1,172	26.9%
	Total w/out Health Care	37,816	35,898	(1,918)	-5.1%
Eastern	Health Care	5,677	8,331	2,654	46.8%
	Total w/out Health Care	65,047	70,328	5,281	8.1%
Northern	Health Care	6,765	9,498	2,733	40.4%
	Total w/out Health Care	60,040	65,786	5,746	9.6%
South Central	Health Care	5,631	7,355	1,724	30.6%
	Total w/out Health Care	66,659	70,256	3,597	5.4%
Southeastern	Health Care	5,184	7,040	1,856	35.8%
	Total w/out Health Care	51,310	50,140	(1,170)	-2.3%
Southwestern	Health Care	22,000	32,684	10,684	48.6%
	Total w/out Health Care	234,007	239,727	5,720	2.4%
*NAICS 621-Ambulatory Health Care Services, 622-Hospitals and 623-Nursing and Residential Care Facilities Source: Quarterly Census of Employment and Wages					

Forecasted growth for the health care industry is also strong. EMSI of Moscow projects the three health care industries will continue to have robust job growth although not as strong as in the past decade. That forecast anticipates ambulatory health care services and hospitals to grow by almost 30 percent between 2011 and 2021, adding 14,800 jobs between them, while nursing and residential care facilities will add 3,400 jobs, or 26 percent to its workforce. These growth rates are much stronger than the projected growth rate for Idaho without health care at 15 percent.

Health Care Industry Projections				
	2011 Jobs	2021 Jobs	Total Change	Percent Change
Ambulatory Health Care Services	29,707	38,517	8,810	29.70%
Hospitals	19,997	25,953	5,956	29.80%
Nursing and Residential Care Facilities	13,352	16,786	3,434	25.70%
Idaho w/out Health Care	561,638	647,881	8,6243	15.40%
Source: EMSI Covered Employment - 2011.4				

Forecasts are mostly based on historic data, but several other hard-to-quantify factors can have an effect. No one really knows how much health care the rapidly aging baby boomers will use. In Idaho, the 65 and over population is forecast to grow 43 percent from 2011 to 2021. Intuitively, this additional 87,000 people will use more health care. They certainly spend more. The Centers for Medicare & Medicaid Services reported that for the calendar year 2004 those 65 and over spent more than three times as much per person on health care as those aged 19 to 64 (source: <http://www.cms.gov/Research-Statistics-Data-and-Systems/Statistics-Trends-and-Reports/NationalHealthExpendData/Downloads/2004GenderandAgeTables.pdf>).

Also, regulatory changes can have many effects on this industry’s employment. Most notably the Supreme Court decision regarding the Patient Protection and Affordable Care Act later this year could have far reaching effect in health care employment.

Population Projections for Idaho				
	2011	2021	Total Change	Percent Change
Under 25	589,312	633,808	44,496	7.6%
25 to 65	802,230	802,313	83	0.01%
65 and Over	200,592	288,061	87,469	43.6%
Source: EMSI Covered Employment - 2011.4				

The health care industry was one of a very few bright spots in the economy for the past decade. Its continual increases to employment provided a new career for workers displaced in the recession. Looking to the future, even with the unknowns about the aging population and regulations, the health care industry will almost certainly continue to be bright spot for years to come.

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POTLATCH BUSINESS PARK HOPES TO ATTRACT OUTDOOR TECHNOLOGY MANUFACTURERS

The city of Potlatch plans to develop a business park to bolster its economy.

The city would use an old mill site to recruit recreational technology businesses including gun manufacturers.

The 145-acre site along the Palouse River has been vacant since 1981 when Potlatch Corp. closed the mill. About 18 months ago, the company offered the site to the city for a business park, and city leaders and economic development specialists began brainstorming ways to bring industry back to Potlatch.

The city plans to advertise the Palouse River Ridge development as an ideal location for firearms-related manufacturing and other outdoor recreation companies. The mixed-use development, which will include housing, also may contain gun- or hunting-themed shops. The plan also calls for walking trails to tie the development into the city.

“What we want to develop is a cluster where one manufacturer can support other manufacturers,” said Gary White, a marketing consultant with P’Chelle International. “The dynamics of working together can be phenomenal.”

P’Chelle International conducted the marketing research for the park and suggested the recreational technology focus. The final marketing plan, which will include a list of contacts for businesses looking to relocate, should be available in late June.

The local culture and state regulations make the community a great place for firearms companies. Idaho is among a handful of states that actively recruits firearms companies. State laws place limits on the ability to go to court to recover damages from Idaho-based firearms or ammunitions manufacturers.

Last fall, an ammunition maker moved two miles north of Potlatch from western Washington. PNW Arms is already expanding and is starting to sell a special type of training ammunition. Typically police departments save costs by using less-expensive ammunition when they train. That cheaper ammunition performs differently, which can lead to mistakes when police are in life-threatening solutions. PNW’s new product is as inexpensive as other training ammo but performs like the ammunition police use on the job.

The company is preparing to introduce Tacops, a product to help citizens protect themselves from intruders, and is developing other new products.

In April, it began adding both a second and third shift, hiring up to 60 people.

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Area and County Developments

NORTHERN IDAHO

Benewah, Bonner, Boundary, Kootenai & Shoshone counties

REGIONAL DEVELOPMENTS

- The success rate has been high in North Idaho College's health information technology course. Eighty percent of the 327 students enrolling in the one-semester course offered the past two years received postsecondary certificates and 70 percent of those graduates found health information technology jobs with health care providers across the state. With a \$625,000 grant, the school offered courses leading to certificates in Electronic Medical Records Adoption for Healthcare Practices and Electronic Medical Records-Information Technology Support that qualified the graduates for jobs in those fields.
- Revett Minerals Inc. of Spokane wants to begin mining beneath the Cabinet Mountains Wilderness in northwestern Montana, but the Confederated Salish and Kootenai Tribes want to preserve the area and prevent the company from disturbing a cultural site. Although preserving the area wouldn't necessarily put an end to the project, the tribes are working to have Chicago Peak named a traditional cultural property under the National Historic Preservation Act. The mine's entrance would be located outside the Cabinet Mountains Wilderness area, but to get to thousands of tons of copper and silver Revett would tunnel down beneath Chicago Peak.
- Medical Oncology Associates is building a \$4 million, 22,000-square-foot cancer treatment center in Spokane Valley. It will open with 10 employees including two doctors.
- A technology incubator is being developed in Spokane. The innovation center has already signed four tenants for its opening in August. Seattle-based McKinstry purchased a 38,000-square-foot building and is investing an additional \$5 million to expand the innovation center for tenants in clean technology, life sciences and education.
- Local ski areas report mixed results this year. The season ended for most of the five inland northwest ski resorts in early April. Mt. Spokane northeast of Spokane and 49 Degrees North near Chewelah reported 80,000 skier visits, which is an average year. Early and late-season attendance was strong but offset by a midseason decline during the snow drought. Silver Mountain in Kellogg reported a lackluster year, falling 8 percent below last year's strong attendance. Schweitzer Mountain in Sandpoint, which opened its earliest in more than 25 years, reported that attendance was up from last year, which was also above average. Lookout Pass on the Idaho-Montana border near Mullan had a record season with nearly 64,300 skier visits. It was an abnormal ski season starting with early open-

ings, followed by lack of precipitation through midseason, and ending with late season snowfalls.

- Most inland northwest ski areas have plans for expansion. 49 Degrees North near Chewelah is investing \$2 million in a new chairlift and a mid-mountain lodge. Pending approval, Spokane Mountain wants to add 280 acres of forest to create seven new ski trails and one new chairlift. Schweitzer will operate a new zip line this summer, and the Lookout Pass master plan includes two new chairlifts and 14 additional ski runs.

COUNTY DEVELOPMENTS

BENEWAH COUNTY

- Up to 50,000 yards of contaminated material will be removed from an old Milwaukee Railroad switching and maintenance yard west of Avery. The \$9.3 million cleanup will move the contaminated material from the 10-acre site to Medical Lake.
- The Kootenai School District was awarded \$135,324 for an after school program, sharing a \$1.5 million grant from the state with 10 other districts. The competitive grant awards for the 2012-2013 school year ranged from \$98,039 to \$150,000 and are renewable for up to five years. A before and after school program will be offered to students in kindergarten through eighth grade Monday through Thursday beginning in mid-September.
- The St. Maries Rotary Club is building a \$100,000 band shell for St. Maries City Park. The project, in the works for a year, will include a three-sided building, stage, storage and sound system.

BONNER COUNTY

- Cracks at the south end of the Sand Creek Byway are forcing the Idaho Transportation Department to push back the opening of the U.S. Highway 95 realignment project from the May 31 date. Although the project is not officially scheduled to be done until this fall, the contractor could have it done by the 4th of July.
- The Kodiak, manufactured by Quest Aircraft, is now certified in eight countries with additional certifications in process. The Kodiak, a 10-seat, single-engine turboprop utility airplane is designed for short take-offs and landings and has float capability. Headquartered in Sandpoint, Quest Aircraft was established in 2001 and began deliveries of the Kodiak in December 2007. Kodiaks are in service with charter operators, small businesses, personal owners, U.S. and international governments and humanitarian organizations. The additional certification will help sales and allow more variation in market segments.

KOOTENAI COUNTY

- One of Post Falls' oldest businesses has closed after 43 years. Anderson Iron Works is the maker of ornamental iron, railings, spiral stairs and other custom iron products. Anderson's work is spread throughout the region including on the entrance sign to The Coeur d'Alene Resort, Silverwood Theme Park, the flower baskets in downtown Coeur d'Alene, the elaborate "Amway" house on the Spokane River in Post Falls, the

"Extreme Makeover" home near Sandpoint, restrooms at Coeur d'Alene parks, Post Falls' entrance waterfall features and at numerous homes. The company never got big. It generally has five or so employees because the few quality precision craftsmen available stuck around. The business also won a national American Legion award in 2004 for employing veterans.

- Kootenai County commissioners approved Silverwood Theme Park's request to rezone more than 400 acres in the park from rural to commercial so the park can build more attractions and other projects as needed. The commissioners also approved rezoning 95 acres of land adjacent to the park to commercial last year with attractions expected to expand there. According to Silverwood officials, the theme park attracted 659,000 guests last year and had a \$79.5 million economic impact in Kootenai County in 2011.
- The sixth annual Post Falls Chamber Community Business Fair attracted more than 1,000 people to the Greyhound Park where over 95 businesses participated. This event continues to be a successful venue for business to engage with future customers and network with fellow vendors. Members of the Post Falls High School Distributive Education Clubs of America chapter assisted with customer service jobs. Over \$2,000 in prizes were given away in the "business BINGO game," and hundreds more were given away. Three 30-minute workshops on restoring credit, public safety and spring gardening tips were offered.
- After nearly three years in development, Kootenai Electric Cooperative's Fighting Creek Landfill Gas-to-Energy project is up and running, producing enough electricity to power about 1,800 homes from the methane gas produced by the decomposition of trash at the Kootenai County Solid Waste Facility. The \$7 million facility was financed by low-interest Clean Renewable Energy Bonds.
- A Veterans Resources Fair was held at North Idaho College, drawing representatives from the Spokane Vet Center, the Idaho Department of Labor, the Kootenai County Veteran Services Office, the Guardian Foundation, IdahoGoes, the Idaho Veterans Services Office and Army OneSource.
- The Kootenai County Indicators website – www.kootenaiindicators.org – has been launched. The Community Indicators Initiative, spearheaded by Eastern Washington University, provides government, business and civic leaders and the general public with information to better help make decisions and track the health of the county. There are 134 indicators in eight categories: people, economic vitality, education, environment, health, housing and transportation, public safety and recreation and tourism. The project is funded by a grant from the U.S. Small Business Administration in coordination with the Inland Northwest Community Foundation.

SHOSHONE COUNTY

- Hecla Mining Co. reported a first-quarter net income of \$12.4 million, or 4 cents per share, down from a net income of \$43.2 million in the first-quarter of 2011, or 16 cents per share. Work continues on shaft rehabilitation at the Lucky Friday Mine, where the company spent \$11.7 million

during the first quarter. Production halted at the underground silver mine in January as a result of shaft safety issues identified by the federal Mine Safety and Health Administration. About 1,500 feet of work has been completed on the 6,100-foot long shaft. Work is expected to be finished in December, and the shaft is expected to be operational by the end of the year.

OPENINGS

- Miller Paint in Coeur d'Alene, the company's first Idaho store
- Keet Sweet Preschool in Coeur d'Alene
- Rogers Burgers in Coeur d'Alene with 34 employees
- Jump for Joy, an indoor party and play center, in Hayden
- Vain Spa in Priest River
- Café 95 in Sandpoint
- Sweet Lou's in Ponderay
- Exercise Institute in Sandpoint
- Sand Creek Salon in Sandpoint
- St. Maries Co-op
- Fu-Ki Japanese Steak House in Post Falls
- StanCraft showroom in its Coeur d'Alene store
- Moose Creek Neighborhood Pub & Grill in Hayden with 25 employees
- Meltz Extreme Grilled Cheese in Coeur d'Alene with 12 employees
- Coeur d'Alene Exchange Thrift Store

CLOSURES

- Curves in Post Falls
- MacXperts in Post Falls
- Butterfly Gardens in Coeur d'Alene

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NORTH CENTRAL IDAHO

Clearwater, Idaho, Latah, Lewis and Nez Perce counties

REGIONAL DEVELOPMENTS

- Jet boat teams from Canada, New Zealand, Mexico and the United States raced on four Idaho rivers in the 2012 World Jet Boat Marathon Championship April 13-21. Over the 450-mile course, racers navigated the rivers at speeds up to 140 miles per hour. The races started on the St. Joe River at St Maries. The next leg was on the Snake River in Lewiston. Then the action moved to the Clearwater River in Orofino. Only seven of the 17 boats that started the race finished the last segment on the Salmon River in Riggins. To welcome the racers and the crowds they attracted, Riggins sported the flags of the United States, Canada, New Zealand and Mexico as it hosted the final days of the championship including the closing banquet. Local restaurants and stores were busy handling the crowds that came to watch while Salmon River Helicopters made dozens of sight-seeing trips over the river canyon. As well as benefiting tourism, the races also brought attention to the boat builders of the Lewis-Clark Valley. Idaho Commerce Director Jeffery Sayer called it "fitting that a race of this

caliber be held at the birthplace of the jet boat industry. This industry cluster plays an important role in our state's economy not only through the business and jobs it has generated but as a result of partnerships like this that will attract hundreds of visitors to Idaho." In the 1960s, Norm Riddle and Darell Bentz of the Lewiston-Clarkston area set out to build a boat that could navigate the rugged Snake and Clearwater rivers. Their success sparked an industry that today provides boats for many uses around the world including recreation, search and rescue, fish and wildlife management and police and military operations. North central Idaho's jet boat manufacturers continue to foster innovation and lead the industry, making the valley the self-proclaimed "jet boat capital of the world." More than 250 people work for boat builders in Lewiston, Orofino and Clarkston, Wash.

NEZ PERCE TRIBE

- The Nez Perce Tribe celebrated the grand opening of a new \$424,000 garage for the Appaloosa Express bus system in late April. The garage near Sweetwater includes seven bays for buses, two offices, a reception area and a washing station. The four-year-old system provided over 23,000 passenger trips in 2011, and ridership continues to grow. Running from 5:30 a.m. to 7 p.m., the buses cover three routes from Cul-de-sac, Orofino and Kooskia to Lewiston and back.
- The tribe recently received a \$717,000 grant to complete a pedestrian trail from Lapwai to Red Duck Lane.

COUNTY DEVELOPMENTS

CLEARWATER COUNTY

- Dworshak Reservoir near Orofino received national attention in April and a new way to access it in May. Bassmaster Magazine placed Dworshak Reservoir on its top 100 best places to fish for bass. Extending 53 miles upstream from the dam, the reservoir has dozens of secluded inlets and streams ideal for bass fishing. A grant obtained by Clearwater County allowed the construction of a destination dock on Dworshak Reservoir for improved water access at the state park there. To meet the grant's matching requirements, the Army Corps of Engineers provided equipment to assemble and place the dock between the Big Eddy Marina and Indian Creek.
- The Idaho State Correctional Institution in Orofino is at full capacity. The Correction Department plans to make several upgrades including a new perimeter fence detection system with razor wire, a gate system, computer system improvements to increase security, installation of a new HVAC system, major remodeling of the kitchen and laundry areas and construction of a new maintenance building in response to safety audit findings. The prison warden told a group at the Orofino Chamber of Commerce meeting in April that these improvements demonstrate the state's support for continued operation in Orofino. The Idaho Department of Correction advertised five correctional officer positions at a career fair sponsored by the Idaho Department of Labor on April 13. The jobs start at \$13.14 per hour with benefits and the opportunity of internal promotion.

IDAHO AND LEWIS COUNTIES

- Kamiah High School's professional-technical programs again demonstrated their strength by taking gold at the state Skills USA and Health Occupation Students of America competitions. Both are three-day leadership and academic events where students from all over Idaho compete. This year, Kamiah students finished first and second in technical drafting, and two others finished in the top six. The Skills USA competitors are taking online engineering and working toward industrial certification for Solid Works software. At the health students' competition, a Kamiah junior took first place in pathophysiology, qualifying for the national competition in June. Students in the health occupations competition are taking online classes from Lewis-Clark State College Tech-Prep's medical careers program as well as locally offered classes in anatomy, physiology, health and psychology.
- Holcomb Construction of Grangeville was awarded a \$30,631 contract for work on the Grangeville wastewater treatment facility. The company will replace the roof, do interior and exterior painting and electrical work at the headworks building, which was damaged in a February fire.
- The Lewis County Courthouse in Nezperce was remodeled in April. Local contractors installed energy efficient windows and replaced worn carpeting. Funding for the project came from the Snake River Basin Adjudication settlement, in which Lewis County lost land but received a one-time payment in lieu of taxes.
- The Idaho Transportation Department has begun a \$1.8 million project on a 10-mile stretch of U.S. 95 south of Cottonwood to south of Ferdinand that involves recycling asphalt shoulders, constructing right-turn lanes and micro-surfacing the reclaimed shoulders and turn lanes. Guardrail and illumination work also is under way. Poe Asphalt Paving Inc. of Lewiston is the contractor. The project is slated for completion July 9.

LATAH COUNTY

- The University of Idaho and its Extension program have been awarded a \$1.1 million National Science Foundation grant to extend science, technology, engineering and mathematics education to underserved Coeur d'Alene and Spokane Indian tribal students. The three-year project combines indigenous knowledge systems with Western science to engage Indian students in those disciplines. Focusing on watershed monitoring and health, the program will offer interdisciplinary, place-based lessons in an afterschool and summer program format for students in grades four through six. In addition to using multimedia and social media during the program, participants will create a virtual watershed website featuring an interactive map with locations of social, cultural and scientific significance. The program also will train teachers of Indian students to more effectively incorporate activities involving science, technology, engineering and mathematics into their lessons.
- University of Idaho officials launched a \$225 million capital campaign this spring to attract money for scholarships, new faculty and upgrades to laboratories and classrooms. The two-year campaign, Inspiring Futures: Invest in the University of Idaho, has a goal of \$62 million for facility im-

provements, \$63 million to attract new faculty, \$54 million for scholarships and \$46 million to foster partnerships with industries and business.

- Tuition and fees at the University of Idaho will rise 6.1 percent in the school year starting this fall. In-state undergraduates will pay an additional \$356 per year for a total annual tuition and fee rate of \$6,212. Higher education's general fund appropriation for 2012-2013 will increase 8.6 percent, providing ongoing base funding for health insurance increases, pay raises, enrollment workload adjustment and occupancy costs. Another \$2 million was allocated for the Idaho Global Entrepreneurial Mission. The university's support from the state decreased from 73 percent of the university's total budget in 2000-01 to 49 percent in 2011-12. At the same time, the portion of the university's budget that comes from student tuition and fees jumped to 47 percent from 19 percent.
- Tuition at Washington State University will increase 16 percent for the 2012-2013 school year. In-state undergraduates will pay about \$1,500 more. Their tuition currently is nearly \$9,900 per year. "Tuition increases at this level are unsustainable," President Elson S. Floyd said, "and if continued will compromise access and affordability for students. We must continue to maintain the quality of a WSU education without pricing students out of the market."
- The governor added Latah County to the disaster declaration list resulting from late March flooding. The South Latah County Highway District needs to make \$75,000 in restoration and preventive repairs on rural roads including plugged up culverts, washed out roadway shoulders, ditch erosion, gravel loss and a mud slide. The city of Kendrick incurred \$13,000 to repair its storm water drain system.
- Washington State University received a \$5 million donation from the family of Chuck and Louanna Eggert to expand its organic farm from four acres to nearly 30 acres. The Eggerts, who met while attending the university, grew Pacific Natural Foods from a small soy milk production company to a global leader in natural food development, sustainable and organic farming and land stewardship that supports farmers and ranchers. The expansion gives Washington State the largest organic teaching farm on any university campus in the United States.

NEZ PERCE AND ASOTIN COUNTIES

- Tuition for Lewis-Clark State College students will increase 4 percent in the coming school year. In-state students will pay \$5,562 for the year. Since 2009, the college's enrollment has increased 19 percent while state funding decreased 20 percent. Enrollment growth, tuition increases and measures to reduce cost have allowed the college to operate without major program cuts. The burden of paying for higher education has been shifted to students. Before the recession, the state paid half the cost of running the school while students paid 17 percent of the cost. This year, the state is paying less than 30 percent of the tab while students are contributing 30 percent.
- Lewiston's Urban Renewal Agency agreed to issue \$2.5 million in bonds as part of a plan to finance downtown upgrades that include replacing aging water, sewer and stormwater lines, widening sidewalks and adding

artistic elements. The city also will pay \$300,000 to replace an aging sewer line that serves the entire city. Total costs, including engineering, are estimated to total \$3.2 million. Work is expected to start in the next month.

OPENING

- Mantique Warehouse in Clarkston, Wash., selling antiques and motorcycle gear

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SOUTHWESTERN IDAHO

Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley & Washington counties

COUNTY DEVELOPMENTS

ADA COUNTY

- The Boise Veteran Affairs Medical Center is expanding. Plans call for an additional 8,000-square-feet per floor, doubling the size of the facility for another operating suite and a larger intensive care unit. Bids were collected in late March, and construction is slated to begin this summer with a projected completion date of November 2013.
- Blue Cross of Idaho has acquired Peak 1 Administration of Coeur d’Alene. Peak 1 administers ancillary health insurance products like health reimbursement accounts. No immediate job additions were announced.
- Brewforia Beer Market announced it plans to open a second store in in the Eagle River Landing. It will be twice the size of the original Meridian location. The new store will open in late July.
- Western Aircraft is making good on its pledge to hire more employees if an aircraft parts sales tax exemption passed. The company announced plans to hire 12 employees this year and would like to add an additional 100 over the next five years as it breaks into new markets.
- Albertsons LLC announced it is closing 13 of 17 stores in Florida. After the stores close, the company will operate 192 stores in seven states. Albertsons is a privately held company that owns and operates the stores not acquired by Supervalu in 2006.
- Microsoft announced it will move up to 40 software engineers from its Boise location to its Redmond, Wash., offices. No date for the move was disclosed.
- Central Garden & Pet Co. plans to open an office in Boise this year. The California-based company will occupy a former Hewlett-Packard call center. It was reported that the company would like to open in June and take two years to get up to full staff.

CANYON COUNTY

- Saint Alphonsus Regional Medical Center broke ground on the Nampa Health Plaza in April. The \$30 million facility will house a birthing center, heart care center and an emergency department. The project will employ roughly 500 during construction and 85 once it is in operation. It will be

completed in phases with the emergency room opening this fall and the rest of the facility in late 2013.

- Airstream Adventures Northwest LLC is opening an Airstream dealership in Nampa this summer. The exclusive dealer will have five employees.

ELMORE COUNTY

- Mountain Home Air Force Base was formally named the preferred location for a Royal Saudi Air Force training mission. If the \$60 billion arms package is agreed to, construction for the needed \$124 million in upgrades could begin this summer. The Air Force expects this mission could increase the base's population by as much as 10 percent, adding a strong boost to the local area's economy.

PAYETTE COUNTY

- Both the Idaho Department of Environmental Quality and U.S. Department of Agriculture plan to help the city of Fruitland with its sewer upgrades. Environmental Quality is loaning approximately \$9.5 million to the community at a 1.75 percent interest rate and supplying an additional \$500,000 grant for the project. The federal government is also loaning the community over \$10 million at 2.75 percent interest.

OWYHEE COUNTY

- Thunder Mountain Gold has received \$18 million from a private equity firm. The company plans to use the money to explore for silver and other minable material in its South Mountain Mine. Geological testing is slated for this summer, and operations could begin in three to five years.

EXPANSIONS

- Parsons Behle & Latimer, a law firm in Boise, has added six employees

OPENINGS

- Commerce Real Estate Solutions, a real estate brokerage firm, opens an office in Boise with 20 people
- Leaf Greenhouse in Boise
- Madeline George Garden Design Nursery in Boise with seven employees
- Blooms floral studio in Boise with three employees
- Hillside Suites Bed & Breakfast in Boise
- Miller Auto Service in Fruitland
- The Yellow Mug coffee shop in McCall with 13 employees
- Four Season Spa & Pool in Meridian
- Apricot Lane Boutique in Boise
- Nordstrom Rack in Boise with 60 employees

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SOUTH CENTRAL IDAHO

Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka and Twin Falls counties

COUNTY DEVELOPMENTS

AGRICULTURE

- Federal regulators at the Environmental Protection Agency have proposed a new permit for feedlots and other confined animal feeding oper-

ators to replace the one that expired in 2003. Major changes include only requiring the permit for producers who actually discharge waste into surface waters rather than just proposing a discharge. “There is a certain level of producer responsibility, which in and of itself makes it difficult to know how many people are going to apply,” EPA state Administrator Jim Werntz said. The agency’s new guidelines also make a producer’s nutrient management plan for handling manure a public document. State law keeps those documents confidential. Protecting water is the goal although the water to be protected has been a point of dispute for years, said Nick Peak, the EPA’s regional coordinator for animal feeding operations. It remains unclear, he said, whether many south central Idaho canal systems fall under the agency’s scrutiny. “When it comes down to it, it’s a case-by-case basis,” Peak said. “If a producer lives close to a canal, I would suggest that they talk to us first before choosing not to apply.”

After high commodity pricing in 2011, Idaho farmers are boosting their planted acreage this year with just a few exceptions. Weather at planting time will be a factor in whether the plans are carried out. Some early planting has already occurred. Both dry beans and corn saw extremely high prices last year, creating competition for field space. North Dakota, the leader in dry bean production, increased its planned acreage 60 percent. Wheat inventories nationally are high, accounting for the reduced planting intentions overall. But durum wheat used in pasta products is in high demand and saw a strong uptick in Idaho. Crops were planted early this year due to higher-than-average spring temperatures.

Idaho Crop Acreage Planting Intentions			
Crop	2012	2011	% Change
Corn	350,000	350,000	Same
Barley	590,000	520,000	13.50%
Winter Wheat	780,000	820,000	-0.049
Durum	15,000	11,000	36.40%
Spring Wheat	540,000	640,000	-0.16
Oats	80,000	70,000	14.30%
All Hay	1.33 million	1.35 million	-0.015
Canola	29,000	19,000	53.00%
Sugar Beets	183,000	176,000	0.04
Dry Beans	130,000	95,000	37.00%
Source: U.S. Department of Agriculture			

Idaho Planting Completion as of May 6		
Sugar Beets	99 % planted	4 % more than average
Barley	89% planted	23% more than average
Spring Wheat	90% planted	16% more than average
Potatoes	82% planted	38% more than average

But sugar beets were hit hard by high winds, frost and hail in south central Idaho, and a number of fields are being replanted. Producers that had prepped the soil with water first found the seedlings were not as readily blown away.

TWIN FALLS COUNTY

- Over a thousand job seekers attended the Chobani job fair at the College of Southern Idaho. The crowd was patient even through bad weather. The company, which is building Greek yogurt manufacturing plant, was recruiting supervisors.
- Castleford's Kows R Us Dairy uses 30 solar panels to heat 400 gallons of water to 165 degrees for sanitation and cleaning purposes. The success has come for a relatively inexpensive investment of \$52,000, provided by grants through the U.S. Department of Agriculture, the U.S. Treasury and Idaho Power Co. Carl Simpson, president of Renewable Energy NW, said other dairymen have expressed interest in the system. "The best environmentalists I've seen have been dairymen and farmers," Simpson said. "They care so much about their land and their cows. They may not be the first group that comes to the top of your head, but they truly care about taking care of their resources." Anaerobic digesters for handling manure are finding acceptance more difficult because the tax incentives that made them viable are a target for repeal.
- Castleford Men's Club donated 25 iPads to the Castleford Elementary School. The school is currently raising money to buy educational applications for the iPads that will enrich the curriculum.
- State Schools Superintendent Tom Luna presented the Buhl School District with a \$100,000 grant to integrate technology into the curriculum to accommodate students with diverse learning styles and skill levels.
- The Art and Soul competition wound up its second year in Twin Falls with artists from across the county entering 178 works. David LaMure Jr. of Kimberly won the \$10,000 first place prize for an almost 12-foot high sculpture titled "Vigilance." The remaining \$20,000 was distributed between 14 other artists amassing high vote totals. Vera O'Leary Middle School won \$1,000 toward the \$100,000 it is raising for a new track.

JEROME COUNTY

- Old Hickory Buildings is moving into the building previously occupied by the Con Paulos Auto dealership in Jerome. The company makes small buildings, bully barns and sheds in the Amish and Mennonite style of furniture design. The workforce demands of the new company were not immediately clear. The company is based in Murfreesboro, Tenn.

BLAINE COUNTY

- The Sun Valley Marketing Alliance reported the skier count down for Sun Valley Resort's 2011-12 ski season at 382,128 compared to 407,537 last season. The Sun Valley and Ketchum area hotels posted 61 percent average weekend occupancy compared with 63 percent the previous winter.
- The Idaho Press Club awarded the Sun Valley Guide first place for its summer 2011 edition. Idaho Mountain Express was the Pinnacle Award Winner with the most awards received by a weekly newspaper in 2011.
- The city of Ketchum has enacted a residential green building code after two years of review. The business community did not protest so the next step is to start the same process for commercial buildings.

- A nationwide survey found 47 percent of respondents nationwide were aware of Sun Valley. The number hit 74 percent among those 55 and older and 65 percent among people making more than \$150,000 a year. But only 23 percent of those under 35 knew about the resort. Thirty-seven percent of those surveyed said they thought of skiing when they heard the name Sun Valley, 21 percent cited potatoes and 12 percent the sun.
- After 14 years, the Sunday entertainment at the Boiler Room at the Sun Valley Resort will end. Forever Plaid has been a mainstay at the resort, and the general manager has played a lead role as one of the four Plaids. Wally Huffman started out as an understudy but enjoyed the music, camaraderie between the Plaids and the change of pace from his leadership role at the resort. The resort is attempting to appeal to a younger market segment.

MINI-CASSIA AREA

- The mayor of Burley is asking officials in both Cassia and Minidoka counties for letters of support to move the current municipal airport inside the city limits. Three sites have been identified for the new airport, which is seen as financially feasible and could be completed in eight years. The city is prepared to close the current airport for safety reasons if a new airport is not built.
- Minidoka County School District trustees voted to lay off 11 teachers in an effort to reduce payroll and meet budgetary cutbacks. Another eight jobs are being cut through attrition and retirements. The reduction in force depended on retirements or attrition — there were originally 19 teaching positions targeted.
- Idaho Department of Transportation will begin replacing two bridges spanning the Snake River near Declo. The bridges carry Interstate 84 traffic so there will be stages to the new construction that is slated for completion in 2015.
- The Heyburn Urban Renewal Agency voted to accept the plan of a 71.5 acre site on the north side of Alfresco Drive for its second project. The area was originally considered for development from a bare ground parcel to a business park with a hotel, restaurants and a theatre have been start-stop since before the recession.

OPENINGS

- Magic Valley Olive Oil Co. in Burley, selling 30 varieties of olive oil and balsamic vinegars
- Steve Regan Co., a feed and seed store in Burley
- Riverview Urgent Care and Medical Center in the former Hollywood Video space in Burley
- O'Reilly Parts Store in a new building in Jerome
- Chico's, an upscale woman's clothing boutique in the Shops at Magic Valley Mall in Twin Falls
- Melon Valley Detail, an automotive carwash and cleaning service in Buhl
- Deseret Books, a Mormon bookstore in Twin Falls

CLOSURES

- Dr. Amy Kauffman, a Burley surgeon, is moving back to her home state of New York

- Sprint's Sales and Repair Store in Burley
- Garden Cents in Rupert

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SOUTHEASTERN IDAHO

Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida & Power counties

COUNTY DEVELOPMENTS

BANNOCK COUNTY

- ATCO Structures and Logistics is opening a new plant in Pocatello at the Gateway West Industrial Center, where it will build modules for housing, recreation and office space at remote oil and mineral exploration sites. The 200,000-square-foot plant is expected to employ 150. The company's April job fair at the Pocatello office of the Idaho Department of Labor drew 900 job seekers. The skills ATCO needs are directly related to the construction industry, which was hit hard by the recession. Bannock Development Corp. and its former director Gynii Gilliam, who is now an economic developer for the state Commerce Department, spearheaded the campaign to attract ATCO.

BEAR LAKE COUNTY

- The Montpelier Veterans of Foreign Wars post made a \$500 donation to Bear Lake High School – a tradition for the chapter which has supported the school for years.
- Parents, students, coaches and volunteers updated the Bear Lake High School softball field. The volunteer effort took two days and was finished in time for the team's first home game against Soda Springs. The softball field is an important community gathering point, and the repairs and upgrades will benefit not only local high school students but other local teams, which also use the field.

BINGHAM COUNTY

- Scott Crane, the superintendent of the Blackfoot School District for the past five years, is retiring at the end of the school year. Crane, who has served in the Blackfoot District for 26 years, feels good about his time as educational leader in Blackfoot. "We have increased our scores 14.5 percent in math and reading," he said. "I'm going to miss the relationships with professional staff, faculty and students here."

CARIBOU COUNTY

- Monsanto's elemental phosphate plant has filed for a Tier II mercury emissions permit from the Idaho Department of Environmental Quality. State law requires plants emitting over 62 pounds of mercury a year to perform a feasibility study on available emissions reduction technology. Monsanto's mercury emissions are above that threshold. The company says it needs the permit because existing emission technology are not practical or economically feasible.

FRANKLIN COUNTY

- The 2012 Health and Wellness Expo at Preston High School, sponsored by the Franklin County Medical Center, drew hundreds of participants.

About 60 booths offered information and services to local Franklin County residents including one providing vision tests. The Franklin County Medical Center offered access to a number of tests and services including PSA screens, mammograms, chemical panels and tetanus shots. A teddy bear clinic operated by the Preston High School Health Occupations class gave children an opportunity to learn about health care related careers.

ONEIDA COUNTY

- Ireland Bank working with the Oneida County Deputies Association gave two county officers serving on the Southeast Idaho Tactical Response Team new ballistic helmets. The helmets will help protect the lives of the officers as they respond to critical situations.

POWER COUNTY

- The American Falls High School Future Farmers of America chapter placed first in the Agricultural Issues competition at the Idaho Future Farmers of America State Leadership Conference. The students also won the Gold National Chapter Finalist Award and will compete against high school FFA chapters from across the nation in Indianapolis this October. Agriculture and manufacturing related to farming are very important economically to American Falls and Power County. The FFA students are doing their part to keep the community's agricultural tradition alive and well.

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EASTERN IDAHO

Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison & Teton counties

COUNTY DEVELOPMENTS

BONNEVILLE COUNTY

- Another phase of layoffs – 35 to 40 workers – is expected at the Idaho National Laboratory in May. The opportunity to self-select is being provided but if not enough volunteers are available, involuntary layoffs will begin.
- Battelle Energy Alliance met its goal to direct 44.5 percent of contract spending to small businesses. In fact over half the procurement volume – or \$176 million – went to small businesses. Idaho businesses captured \$130 million in INL contracts.
- The Idaho Falls school board vote was unanimous in naming a new magnet school. District 91's new school will be called the Compass Academy and will open this fall by hosting class for freshmen and sophomores. Within three years an expected 600 students will attend all four years of high school.

MADISON COUNTY

- The Sugar-Salem School District was one of 15 statewide to receive a \$100,000 Idaho System for Education Excellence grant from the J.A. and Kathryn Albertson Foundation. The money will be used to upgrade technology resources and for teacher training.

- The U.S. Department of Education has awarded three eastern Idaho schools five-year 21st Century Community Learning Centers grants. Madison and Fremont County Joint school districts will each receive \$150,000 each year, and the Sugar-Salem district will get \$98,000 each year. The grants are limited to districts with at least half their students eligible for free or reduced lunches. The grant money will be used on after school programs that help increase academic success.

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The Idaho Department of Labor offers many services for businesses and job seekers. Help in searching for a job is available through workshops at local offices ([see online calendar](#)) or on our web site through an online workshop and booklet. See below.

Maximize Your Job Search



Take an online job search workshop or download the 24-page booklet, "Maximize Your Job Search in English or Spanish." These cover such job search topics as:

- Getting Started
- Identifying Skills
- Setting Goals
- Networking and the Hidden Job Market
- Social Networking
- Do I Really Need a Résumé?
- Captivating Cover Letters
- Gearing Up for the Interview
- Thank You Notes
- The Job Offer

Find it on our website at

labor.idaho.gov/jobsearch

Maximize Your Job Search



Take the
ONLINE WORKSHOP ►

Participe en
el taller en línea ►

Finding a Job or Making a Career Transition?
Download the workbook and take the online workshop.



Download the
JOB SEARCH WORKBOOK ►

Descargue el
manual de búsqueda de trabajo ►

April labor force data for Idaho will be released May 18. County and city data will not be released the following week due to technical issues. However, all data will be published online when they are released. See lmi.idaho.gov for most current information.

State of Idaho Data — State Economic Indicators

				% Change From	
	Mar 2012**	Feb 2012*	Mar 2011	Last Month	Last Year
IDAHO LABOR FORCE (1)					
Seasonally Adjusted					
Civilian Labor Force	779,100	777,200	769,000	0.2	1.3
Unemployment	61,900	62,500	67,000	-1.0	-7.6
Percent of Labor Force Unemployed	7.9	8.0	8.7		
Total Employment	717,200	714,700	702,000	0.3	2.2
Unadjusted					
Civilian Labor Force	775,500	774,200	765,100	0.2	1.4
Unemployment	66,900	70,000	72,400	-4.4	-7.6
Percent of Labor Force Unemployed	8.6	9.0	9.5		
Total Employment	708,600	704,200	692,700	0.6	2.3

U. S. UNEMPLOYMENT RATE⁽²⁾

	Apr 2012	Mar 2012	Apr 2011		
	8.1	8.2	9.0		

UNEMPLOYMENT INSURANCE

	Apr 2012**	Mar 2012*	Apr 2011		
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Claims Activities

Initial Claims ⁽³⁾	9,942	9,795	12,384	1.5	-19.7
Weeks Claimed ⁽⁴⁾	95,003	99,655	97,540	-4.7	-2.6

Benefit Payment Activities⁽⁵⁾

Weeks Compensated	68,018	86,141	84,587	-21.0	-19.6
Total Benefit \$ Paid	\$15,986,797.04	\$21,133,093.99	\$20,152,336.14	-24.4	-20.7
Average Weekly Benefit Amount	\$235.04	\$245.33	\$238.24	-4.2	-1.3
Covered Employers	47,074	47,074	47,825	0.0	-1.6
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$205,230,546	\$209,396,085	\$252,193,134	-2.0	-18.6

U.S. CONSUMER PRICE INDEX⁽²⁾

	Apr 2012	Mar 2012	Apr 2011	% Change Month	% Change Year
Urban Wage Earners & Clerical Workers (CPI-W)	227.0	226.3	221.7	0.3	2.4
All Urban Consumer (CPI-U)	230.0	229.4	224.9	0.3	2.3

**Forecast data

* Preliminary estimate

(2) Source: U.S. Bureau of Labor Statistics.

(3) Includes all entitlements on intrastate and interstate agent, new and additional claims.

(4) Includes all entitlements, intrastate and interstate agent.

(5) Includes all entitlements, total liable activities.

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Metropolitan Statistical Areas (MSA): A county or a combination of counties in which at least half the residents live in an urban center of 50,000 or more and the rest have significant commuting ties to that central county. The Office of Management and Budget designates the MSAs. Idaho has five MSAs: Boise MSA including Ada, Canyon, Boise, Gem and Owyhee counties; Bonneville MSA including Bonneville and Jefferson counties; Pocatello MSA including Bannock and Power counties; Lewiston MSA including Nez Perce County and Asotin County, Wash.; Coeur d’Alene MSA including Kootenai County.

Micropolitan Statistical Area (MicSA): Combinations of counties in which at least half the residents live in urban centers totaling at least 10,000—or 5,000 living in a single urban center—and the rest have significant commuting ties to that central county. The Office of Management and Budget designates the MicSAs. Idaho has three MicSAs: Burley MicSA including Cassia and Minidoka counties; Rexburg MicSA including Madison and Fremont counties; Twin Falls MicSA including Twin Falls and Jerome counties.

Glossary of Labor Market Terms (cont.)

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Small Labor Market Areas (SLMA): Combinations of counties with significant ties through commuting patterns but no urban centers with populations of 10,000 or more. The Office of Management and Budget designates the SLMAs. Idaho has two SLMAs: Hailey SLMA including Blaine and Camas counties; Grangeville SLMA including Lewis and Idaho counties.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.

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